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ABSTRACT

This document contains 19 papers on adult education and development worldwide. The following papers are included: "Editorial" (Heribert Hinzen); "Lifelong Learning in Europe: Moving towards EFA (Dakar Framework for Action on Education for All) Goals and the CONFINTEA V Agenda" (Sofia Conference on Adult Education); "Poverty and Schooling in the Lives of Girls in Latin America" (Nelly P. Stromquist); "Promoting Democratic Values through the Discussion Forum (DF) Strategy: Evaluation of Its Impact on the Knowledge, Attitudes and Practices (KAPs) of Adult Learners in Tanzania" (Willy Komba); "Empowerment of Women in Cuba: Experiences of the SOFIA Mentor Program" (Janneke Jellema, Magdalena Mazon Hernandez); "Gender Impact of HIV/AIDS/STIs" (Human Immunodeficiency Virus/Acquired Immunodeficiency Syndrome/Sexually Transferred Infections): Some Implications for Adult Education Practitioners in West Africa" (Evelyn Appiah-Donyina); "10 Years of Project Activities in Mexico" (Ursula Klesing-Rempel); "What Works and What Doesn't" (Herbert Bergmann); "From Dakar to Pisa: Growing Support for Basic Education" (Michael Hofmann, Stefan Lock); "Putting Bread on the Table: The Effects of Literacy and Livelihood" (Ekundayo J.D. Thompson); "Multilingual Literacies as a Resource" (Anthony Okech); "Ethnic Differences in the Approach to Adult Literacy: Experiences from Nationwide Literacy Training" (Godfrey Sentumbwe); "The Role of Adult Education in Sustainable Development" (Forough Olinga, Margaret Nakato Lubyayi); "Adult Education and Skills Training for Small and Medium-Size Enterprises in the Tourist Industry in One Region of Chile" (Oscar Corvalan V); "Training

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Methodology Used by the Nigerian Indigenous Apprenticeship System" (Raymond Uwameiye, Ede O.S. Iyamu); "Public Health Education in Rural Thailand: Professional Perspectives on the 'Learning @ the Workplace' Program"(Montira Inkochasan, Thitikorn Trayaporn, Marc Van der Putten); "Why Dialogue Is Important" (Romano Prodi); "Adult and Continuing Education in and through International and Supranational Organizations" (Joachim H. Knoll); and "After 11th September ... Development-Oriented Adult Education as World Domestic Policy?" (Heribert Hinzen). Some papers contain substantial bibliographies. (MN)

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- **Sofia Conference on Adult Education: Call to Action**
- **Gender and Citizenship**
- **Basic Education and Literacy**
- **Orientation and Training**
- **Cultural Dialogue and Adult Education**

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ADULT EDUCATION AND DEVELOPMENT

is a half-yearly journal for adult education in Africa, Asia and Latin America. At first, in 1973, the journal was intended by the German Adult Education Association (DVV) to help keep in touch with past participants in DVV further training seminars and to support the work of projects abroad. Today, the journal is a forum for dialogue and the exchange of information between adult educators and authors in Africa, Asia and Latin America, both among themselves and with colleagues in the industrialized nations. It is intended to disseminate and discuss new experiences and developments in the theory and practice of adult education. The main target group consists of adult educators working at so-called middle levels in teaching, organization or administration. Increasingly, staff in related fields such as a health education, agriculture, vocational training, cooperative organizations etc. have been included, as their tasks are clearly adult education tasks. We also aim to adult educators at higher and top levels, academics, library staff and research institutions both in Africa, Asia and Latin America and in the industrialized nations.

We herewith invite adult educators from all parts of the world to contribute to this journal. Articles should bear a considerable reference to practice. All fields of adult education and development can be treated, i. e. adult education should be regarded in its widest sense. We kindly ask you to send us articles of about 1500 words; footnotes should be used as sparingly as possible.

Responsible for contents are authors. Signed articles do not always represent the opinion of the German Adult Education Association. You are invited to reproduce and reprint the articles provided acknowledgement is given and a copy is sent to us.

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Editorial

The challenges and tasks facing adult education are becoming neither fewer nor easier. Whenever political, social and cultural problems need to be resolved, there are pleas for help. This is true both in the priority area of combating poverty, which will not succeed through economic achievements alone (can it succeed without education and training?), in intercultural dialogue, which demands knowledge of the Other and the Alien (who is to provide this, and how?), and in the field of education itself, as the results of PISA show (not in this case the leaning tower in Italy but the Programme for International Student Assessment), when it is suddenly realized that adult education can to an increasing extent compensate for pupils' shortcomings (alongside improved school education). But when adult education itself calls for help because the arrangements for delivering it are becoming more difficult, state subsidies are falling rather than rising, professional and institutional advances are being put into reverse rather than built on, and legislation and funding are adequate only in exceptional cases, then it is not so easy to find willing ears, effective assistance and supportive allies.

Major international conferences often provide the framework for measuring what has been achieved – following each of them, an assessment is made after a gap of some five or six years: Copenhagen (the social summit), Beijing (the conference on women), Rio (the environment), and so on. For those of us working in literacy and adult education, these milestones are CONFINTEA (the international conference held every 12 years, most recently in 1997 in Hamburg) and Dakar, the World Education Forum held in 2000, which set new targets under the banner of Education for All. We are now preparing to examine what has been achieved at next autumn's UNESCO General Conference, three years after Dakar and six years after Hamburg, half way through the actions proposed in the Hamburg Declaration and the Agenda for the Future. We shall be recalling key demands and commitments such as: “we commit ourselves to promoting the culture of learning through the ‘one hour per day for learning’ movement and the development of the United Nations Week of Adult Learning”. The second of these has in fact been implemented with some success, festivals of learning of various types being held in almost 50 countries in 2002.

The Dakar Framework for Action sets six major goals, including: “(iii) ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes; (iv) achieving a 50 percent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults”. It is pleasing that a wide variety of initiatives, action plans and even “fast track countries” can indeed be identified, and it is fair to say that these are promising because they combine national political will with resources and are backed by international support. But it is shocking that too many countries are half-hearted in their attempts to do their bit to tackle what is, admittedly, the huge challenge of halving the number of illiterates (currently 900 million). And it is disappointing that it is already clear that the holistic view and the spirit of Dakar are increasingly being narrowed down to school education for children, even though the importance of this should not be understated in regretting the neglect of adults.

The majority of the articles collected in this issue are concerned with the reality of adult education in the form of basic education, literacy, environmental education, vocational continuing education, cultural orientation, health education, etc. They are thus reports of “shop floor” efforts to attain major adult education targets of improving living conditions – with or without the sanction or recommendations of international forums. They also contain oblique calls for more support, so that such examples of good practice can be applied more widely. If we keep on knocking, the door will one day be opened.

Heribert Hinzen

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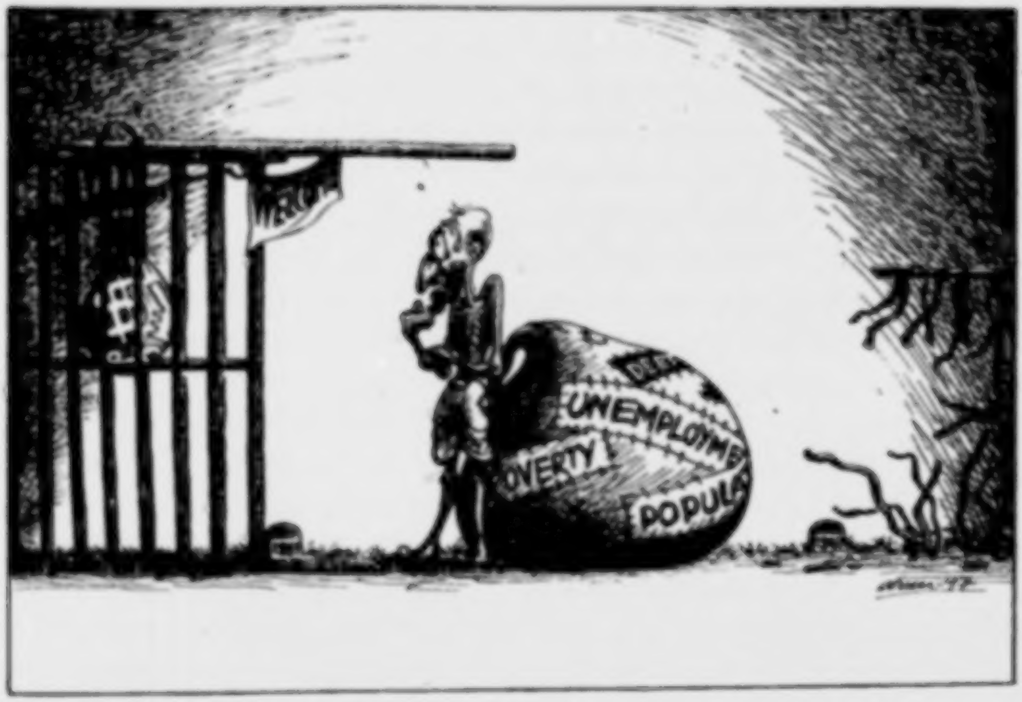
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Sofia Conference on Adult Education

Lifelong Learning in Europe: Moving towards EFA Goals and the CONFINTEA V Agenda

Call to Action
9th November 2002
Preamble

Two hundred delegates from Europe, North America and Central Asia participated in an international conference on **Lifelong Learning in Europe: Moving towards EFA Goals and the CONFINTEA V Agenda** in Sofia, Bulgaria, 6th–9th November 2002. Participants included Government Ministers, parliamentarians, officials from government and multi-lateral organizations, representatives of non-governmental organizations, researchers and adult education practitioners. The Conference was supported by the Ministry of Education and Science of the Republic of Bulgaria, UNESCO and its Institute for Education (UIE), the European Commission Directorate General Education and Culture, the European Association for the Education of Adults (EAEA) and the Institute for International Cooperation of the German Adult Education Association (IIZ/DVV).

The Conference fully supported the Dakar Framework for Action on Education for All (EFA), the CONFINTEA V Agenda (The resolutions of the Fifth World Conference on Adult Education held in Hamburg in 1997), the CONFINTEA V Follow-up Report, and the Lifelong Learning and Education policies of the European Commission. Support was also expressed for the Lifelong Learning policies adopted by the European Commission designed to encourage gender equality and intercultural learning, to combat racism and xenophobia, to promote social inclusion and the inclusion of older learners and people with disabilities.

A Call to Action

The Sofia Conference "Call to Action" is being issued to express support for the excellent work done to date on EFA, CONFINTEA V and Lifelong Learning and to stress the need for continued progress on the implementation of EFA, CONFINTEA V and Lifelong Learning policies. While applauding efforts to reach out to the school-aged population within EFA and Lifelong Learning policies and practice we want to highlight the inadequate attention being given to the learning needs of adults in many countries. We believe that access to literacy and learning are human rights that must be extended to all, regardless of age as forcefully stipulated in the Action Plan of the United Nations Literacy Decade (UNLD). We think that there is a danger that EFA could come to mean education for all except for adults. We are convinced that the learning needs of adults in the developing nations of the world should not be left unattended because raising the general education levels of parents is a key factor in the achievement of educational goals for the young and in the achievement of overall development goals.

The Issues Identified by the Conference

1. There is a need for greater coherence between and among the various education polices developed by multilateral organizations active in the field.
2. The education of adults has low priority in the implementation of Education for All policies in many countries.
3. Similarly, although Lifelong Learning policies include an emphasis on Adult Education, insufficient attention is being given to the role of Adult Education in Lifelong Learning in many countries.
4. The CONFINTEA V Agenda calls for concerted national and international action involving a wide range of stakeholders. However, many nations need to increase efforts to meet the commitments they made in Hamburg, and to better co-ordinate the actions taken by stakeholders within their borders to implement the Agenda.

5. Many countries do not have the policies, frameworks and structures required to advance Adult Education. Requirements include new legislation, adequate financial support, appropriate institutional structures, effective administrative systems, quality frameworks and the conditions required to support effective partnerships and lobbying.
6. The Conference noted that neither non-formal nor informal Adult Education have parity of status with formal Adult Education. It also noted that the allocation of resources in most countries favours adult learning for the work place at the expense of adult learning for active citizenship and self-fulfillment.
7. While the gender balance at the Sofia Conference was recognized as an example of good practice, the general absence of gender sensitive monitoring of policies and provision in Adult Education in many countries was noted.
8. The Conference was concerned with the increasingly narrow approach being taken to adult basic skills education as demonstrated by the reduction in funding for learning for cultural, health, democratic participation and sustainable development objectives.
9. The Conference was concerned that both learner-centred approaches and the active participation of learners in the learning process are not always present in Adult Education policy and provision.
10. The Conference expressed concern at the slow progress being made toward the recognition and accreditation of non-formal and informal adult learning.
11. Some participants experienced difficulty in gathering information to report to the Conference on their country's performance in meeting the various policy targets set for EFA, CONFINTEA V and Lifelong Learning. There is consensus on the need for regular and consistent reports on progress towards established objectives.
12. There are too few opportunities for international exchange of research, methodologies, curricula, models, frameworks and practices.

The Call to Action Recommendations

The Sofia Conference Call to Action is addressed to "whom it may concern", namely those with the mandate and the power to take action on the specific recommendations made below. These key players in education policy and/or provision include: UNESCO, European Commission, European Parliament, Nordic Council of Ministers, Council of Europe, OECD, local, regional and national parliaments and governments, social partners and NGOs.

1. We recommend that high priority be given to the efforts being undertaken by UNESCO and the European Commission to achieve greater coherence between and among EFA, CONFINTEA V and Lifelong Learning goals. As this work progresses we believe that the specific policy goals established for Adult Education under each of these initiatives require greater visibility if they are to be attained.
2. We encourage equal emphasis on the delivery of learning opportunities in formal, non-formal and informal settings. Partnerships between statutory, non-governmental, and social partners must be fostered to address these different adult learning needs worldwide.
3. The funding of formal, informal and non-formal Adult Education needs to be increased in countries that have not met their Adult Education commitments.
4. Governments at all levels need to ensure that Adult Education remains an explicit and integrated element in their Lifelong Learning policies and practices. The creation of the local, regional and national frameworks and structures that are required for the development, co-ordination, quality management, evaluation and funding of Adult Education needs to be given high priority by the level(s) of government responsible for education under each nation's constitutional arrangements.
5. In addition to reading, writing, numeracy and ICT skills, we recommend that basic education provision should include the skills and knowledge necessary to advance each person's ability to participate fully in the social, cultural, political and economic life of

their communities. As well, additional resources need to be allocated to support adult learning for active citizenship and self-fulfillment.

6. Priority should be given to the development of learner-centred policies and practices and to the encouragement of the active participation of learners in every phase of the learning process from planning to evaluation.
7. Comprehensive local, regional and national statistical data collection systems for Adult Education are required. Data are needed to establish benchmarks, to undertake needs analyses, to plan, to monitor, to report on and to evaluate performance, and to undertake international comparative studies. Employment statistics should contain a section on employment in Adult Education in the state-financed, commercial, non-governmental and self-employed sectors.
8. We believe that regular reports on progress to reach policy targets are a necessity. This applies equally to the EFA Framework and to the CONFINTEA V Agenda. Therefore we recommend that annual national reports on progress should be made to stakeholders and to UNESCO.
9. The need for these annual reports should be stressed in the CONFINTEA V + VI mid-term Review. In addition, The Right To Learn Throughout Life, the so-called "Shadow Report" on progress to date on CONFINTEA V priorities being prepared by NGOs under the auspices of the International Council for Adult Education (ICAE), should form an important element of the 2003 review.
10. Benchmarks and indicators, as well as adequate monitoring and reporting procedures must be developed to ensure that annual reports are comprehensive and complete. UIE should play a key role in the development of these tools and the establishment and functioning of an EFA Observatory in the European region in cooperation with UIS (UNESCO Institute for Statistics).
11. Quantitative and qualitative instruments to monitor the application of gender sensitive policies in the provision of Adult Education must be further developed and used.

12. Comprehensive systems for the certification and recognition of formal, non-formal and informal adult learning must be developed. A key ingredient must be a system for accrediting prior learning.
13. International co-operation and intercultural learning opportunities need to be expanded in order to enrich policy and practice in Adult Education and to contribute to peace and reconciliation, especially in the Balkan, Caucasus and Mediterranean regions.
14. We recommend that a Europe-Africa EFA partnership initiative be established based on the findings of the 2002 Monitoring Report on Education for All: Meeting our Collective Commitments and on the fact that many of the countries represented at the Sofia Conference are donors to developing countries. Those African countries, which at the present rate of progress will not be able to halve their rate of adult illiteracy by 2015, should be provided with funding under the proposed partnership to enable them to achieve that goal in the context of the UN Literacy Decade 2003 – 2012.

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GENDER AND CITIZENSHIP

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Girls pick and sort mushrooms
Photo: Asociación Jalisciense de Apoyo a Grupos Indígenas, Guadalayara, Mexico

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In her article, the author discusses the influence of poverty on education in Latin America. In particular, she examines the question of what this means for women and girls, and she comes to the conclusion that gender is a social construct that plays a considerable part at various levels in the disadvantages suffered by women and girls. While gender-based discrimination remains, poverty cannot be combated effectively. Nelly Stromquist is Professor of International Development Education at the Rossier School of Education at the University of Southern California. She specializes in equity issues and public policy. This article is reproduced by kind permission of BAICE and Taylor & Francis. It is a shortened version of the article "What poverty does to Girls' Education: the Intersection of Class, Gender and Policy in Latin America" published in COMPARE, Volume 31, Number 1/March 2001, pp. 39-56.

Nelly P. Stromquist

Poverty and Schooling in the Lives of Girls in Latin America

Introduction

Latin America is the region of the world where the colonial mode of social organization remained in force the longest – about 300 years since the arrival of the Spanish conquerors (1492) to the first wars of independence (1810). The social mix of subjugated populations (Indians), African slaves, and a dominant white minority that persisted was not conducive to the establishment of fair relations of social and economic exchange. Large holdings by wealthy descendants of the colonists and subsistence agriculture by the exploited and powerless peasantry still characterize the region. Over time, export-based agrarian capitalism led to the emergence of a powerful landed elite capable of using the power of the state to advance its goals. With current trends toward economic competitiveness and the need to develop comparative advantages among countries, it is likely that Latin America will keep up its agro-industrial production, which does not bode well for the resolution of social disparities.

Poverty increased during the 1980-1990 decade in Latin America, going from 46 percent to 60 percent in urban areas and from 80 to 85 percent in the countryside. Extreme poverty increased from 22 to 27 percent in urban areas and from 50 to 52 percent in rural areas, according to statistics gathered by the Economic Commission for Latin America and the Caribbean, also known as CEPAL. In Brazil, the industrial giant of Latin America, 1990 urban poverty stood at 39 percent, or 9 percent above its 1979 level and 5 percent above its 1987 level. More recently, from 1990 to 1997, according to CEPAL, the proportion of poor households in Latin America dropped from 41 percent to 36 percent. Not only are these gains small but the number of people who are poor increased from 136 million in the 1980s to 207 million in 1997.

In Latin America, thus, poverty is not a question of stubborn pockets of uneducated or untrained people but is rather inherent in the social and economic structure of the region. This structure is both the effect and cause of asymmetrical power relations between urban and rural areas, between indigenous peoples and mestizo subcultures, between men and women, and, of course, between the North and the South.

Intractable Poverty

At one level, poverty is essentially a normative concept, specific to each society. At another level, there is what has been called an "irreducible core of absolute deprivation" comprising starvation, malnutrition, and visible hardship. As is repeatedly stated in both academic and mass media reports – without much horror by now – in the world today about 3 billion people live on US $2 a day or less and some 800 million people suffer from malnutrition.

What else do we know about the lives of the poor as a group? Very little, since beyond a few statistics we do not really have detailed studies of the poor. Nor do we know much about the rich, since they can easily avoid scrutiny. The fact that we know little of the lives of poor people greatly handicaps our understanding of the dynamic nature of poverty and how the lives of the rich and the poor intersect in functional and, often, inescapable ways.

In all countries of the world, we are making progress with key social indicators: life expectancy is going up, infant mortality is down, and illiteracy is also down. Yet poverty remains. What does this suggest in terms of the power of education as a tool for change? Could it be that we are ignoring those forces that indeed determine poverty? Probably we spend too much time defining poverty through statistical indicators while paying insufficient attention to the mechanisms and processes that create and sustain it. Further, currently favored indicators of poverty do not tell us the distribution of income or wealth within the household. Poverty refers to what the poor lack, but their lack may be the result of a condition created or at best uncorrected by the upper and middle classes. Omnipresent as the concept of poverty is, it has not been sufficiently theorized in our understanding of how nations advance socially and politically and whether poverty represents an obstacle or is, on the contrary, a byproduct of unchecked "advancement". Work by feminist scholars questions current initiatives by international organizations that call for "poverty alleviation". In their view, it is not alleviation that is needed, but instead drastic changes in power relations reflected in trade, the external debt, investments, and international development assistance.

The State and Education

Most nation-states make an effective and yet paradoxical use of education. On the one hand, education is defended in official discourse as a social good open to all. On the other hand, public education is treated with neglect as budgets are held with a tight rein and the children of the poor receive the lowest quality of education. Unquestionably, the function of education as an easily made promise to reduce poverty serves to foster confidence and stability in society in the meantime.

Now, in the day of the minimalist state, the emphasis is on short-term solutions. Opportunities for the poor are complemented by the state in its subsidiary role of providing certain public goods and income transfers targeted directly at the poorest in society. As public policies to ensure social welfare seem to have reached a nadir, the market is supposed to determine the best set of opportunities for the poor.

The growing social inequality has created a visible demobilization of organized groups and has weakened the influence of labor unions, making it thus difficult for civil society to struggle for the expansion of citizenship rights. In addition, austerity policies have brought reductions to sectors of governmental budgets with the weakest constituencies and yet the greatest potential for addressing the poor: education, health, social security, and public housing.

Social expenditures in Latin America, of which education is traditionally a substantial part, decreased on a per capita basis by more than 20 percent in 1977–81 and again in 1982–85. The situation improved in the 1990s, when education as a percentage of the GNP rose in the region from 2.8 percent in 1990–91 to 3.7 percent in 1996–97 and per capita expenditures in education rose from $251 to $380 in the same period for the population 5–17 years of age.

Schooling and Poverty

Liberal ideology presents education as a system that can do much to further social mobility and redistribution of opportunities, as it presumably works on entirely meritocratic criteria. Liberal ideology also portrays public education as free and compulsory worldwide. This latter assertion is far from reality: it is seldom completely free as parents must buy school materials, books, and uniforms – a substantial expenditure for the poor – and rarely does an educational system in developing countries enforce school attendance.

Educational statistics for Latin America at first glance show an ideal situation with many countries evincing rates of nearly 100 percent in gross primary school enrollment. An examination of secondary school enrollment shows a much lower figure, comparable to that of Africa – which means that a large number of young people leave primary school, often without completing it. When educational statistics are contrasted between urban and rural populations, enrollment rates among the latter populations are consistently much lower.

When the statistics are compared by sex, the degree of access to schooling and retention among girls and boys does not appear to be very different. In fact, in several countries, aggregate data indicate that girls enroll in and complete primary and secondary schooling in greater numbers than boys. If one looks at crude indicators of educational attainment, in seven of nine Latin American countries the rates of primary school enrollment increased in favor of girls during the 1990s and repetition decreased more among girls than boys. In nine out of ten countries, the promotion of girls that finished fourth grade stayed the same or increased, and in eight of those ten countries the proportion of girls that finished sixth grade stayed the same or increased. So, a first impression is that girls are doing even better than boys in schooling.

While most countries rely on UNESCO statistics (which are themselves produced by Member States), there is growing evidence that these statistics grossly underestimate the number of children out of school. These alternative readings of educational participation derive from household surveys, census data, or from computations carried out by UNICEF, whose concern for street children has led it to focus on out-of-school children and children in the labor force. Recognized as a major problem are the low rates of primary school completion.

One of four major regional goals for 2000 (and unlikely to be met) was to attain at least 70 percent primary school completion. There are few educational statistics broken down simultaneously by sex and ethnicity. Those that exist (for Mexico and Peru) show a clear disadvantage for indigenous and particularly school age girls living in poverty.

In the countryside, girls tend to enter primary school slightly older than boys and to leave at earlier grades. The low school participation rates are primarily a function of family or work obligations that render the individual unable to take advantage of available school offerings, but they are also due to a lack of school facilities. In rural areas, there are many single-classroom schools that usually serve only up to third or fourth grade (cases of Peru, Bolivia, Guatemala). The precise features and functioning of these "multigrade" schools remain poorly documented in official statistics. A study focusing on rural schools in Peru found that 90 percent of these schools operated in single rooms and that 37 percent had only one teacher, which suggests a high number of incomplete primary schools. In urban areas, public schools sometimes cannot meet the demand. Thus, one observes the common phenomenon of parents having to stand in line for long hours to ensure that their children will be enrolled before the school reaches its limit (cases of Brazil, Peru, among others).

Life in rural schools, for both students and teachers, tends to be harsh. A large number of these schools have no water, electricity, or sanitation facilities. Girls are frequently called upon to perform domestic tasks for teachers. Teachers in rural areas in Peru are usually younger and less experienced than urban teachers and not trained to deal with multigrade classrooms; their average stay in the poorest rural areas is about two years. The school year is much shorter than officially planned due to absences by both teachers and students. The learning hours per day are also shorter than they should be as time is spent in tangential activities such as long breaks or preparations for various extra-curricular events. While boys and girls are equally affected by these practices, domestic and school factors combine to produce more women than men without schooling or with incomplete primary. In the case of Peru, data for 1997 show that while 28 percent of rural men 15-24 years of age have no schooling or incomplete primary, the figure reaches 39 percent in the case of women.

At the macro level, there exists a strong tie between the inequity in educational capital distribution and the inequality of income distribution. In other words, population groups tend to have levels of school attainment proportional to their income. Most poor and extremely poor children in the region have parents with less than nine years of schooling (72 and 96 percent, respectively).

The assumption of causality between poverty and education may be misread. It is not that parents are poor because they have no education; rather, they have no education because they are poor. Moreover, it appears that education in Latin America increasingly needs more years of schooling to be marketable in the labor force. According to studies by CEPAL, it is necessary to have 10 years of schooling, and in many cases complete secondary, to have an income above the poverty line. The level of education needed for a well-paying job will probably increase because globalization trends in the labor force build upon differentiated schooling: university-level education, especially with technical and scientific degrees, for the high-paying occupations and low levels of schooling for the provision of semi-skilled services in low-paying jobs.

Poor Families and Schooling

Public education at primary and secondary levels, not being free beyond tuition and the provision of some textbooks, represents high expenditures for low-income families. In principle, all families recognize the importance of education. Poor families try to give their children at least several years of education, but in the end withdraw them early. Since the children of the poor attend low-quality and incomplete primary schools, they tend to withdraw from school without having reached a solid literacy threshold; thus, many of them regress in their reading and numeracy skills.

Low educational attainment not always occurs because children are taken out of school. Often, it happens because the children fall behind in their studies, as in cases when members of the family fall ill and children have to help in their care, or when the children themselves get sick and parents have to take them out of school to pay for medicine. Students from poor backgrounds, especially in cases where father abandonment is coupled with poverty, also develop serious emotional and social needs. Children of rural parents sometimes lack birth certificates and without such papers they have a difficult time enrolling in school. Teachers of the poor often report having students who come to school tired, withdrawn, or overly aggressive. In many urban centers, it is common for teachers to find children who show up unannounced on the school's doorstep, their educational history a mystery, or cases where they leave with little or no notice, never to be seen again. These problems affect both girls and boys.

Teachers and Poor Children

It is sometimes forgotten that teachers of poor children are often poor themselves. In Bolivia and Ecuador, 65 to 70 percent of the teachers live in either poor or vulnerable homes. In Mexico and Paraguay, 35 to 40 percent of teachers live in vulnerable homes.

For many years, one of the strongest conflicts regarding public education has concerned the salary of teachers who, compared to people in occupations with similar years of schooling, end up earning much less. In the past seven years, Latin American teachers have received significant raises, as about 70–80 percent of the (modest) increase in educational budgets have gone to better salaries for primary and secondary school teachers. Yet, the fact remains that teachers' salaries are seldom sufficient to have comfortable lives.

The public/private divide in education has significant consequences upon teacher salaries and consequently on the quality of education that is provided to poor as well as non-poor students. On the average, private teachers earn more than public school teachers in primary schools by 10–20 percent; this gap increases to about 30–45 percent in secondary schools (data for Brazil, Chile, Costa Rica, Ecuador, and Paraguay). The wage differential between public and private is substantial enough to foster a migration of the best qualified teachers toward the private system, thus augmenting the difficulties experienced by poor children. According to 1993 data, one-third of the region's teachers lack professional certificates or degrees. It is well known that these teachers are usually assigned to work in rural areas, thus compounding the negative effects of poverty among rural children.

In short, poverty not only prevents poor children from gaining access to schooling, but it imposes limits on the number of years of school attainment. The state contributes to this situation by the provision of incomplete primary schools and inexperienced teachers in the countryside.

Poverty and Women

Feminist perspectives assert and have empirically demonstrated that gender is an element of social relationships that operates at multiple levels, affecting everyday interactions, public institutions, work, and the household. The consequences of gender distinctions are reflected in political, economic, and cultural spheres. Within the cultural sphere, gender asymmetries are expressed and reproduced through definitions of femininity and masculinity (including prescribed types and range of emotions) supported by such mechanisms as ideology, sexuality, language, law, schooling, and the mass media, among many others.

Feminist perspectives maintain that gender is a social marker that affects men and women. They also maintain that it affects all women negatively regardless of social class and ethnicity. Rather than argue which social marker is the strongest discriminator, feminist views are sensitive to the effects of the interaction of these markers and do not underestimate the specificity of gender.

Some societies defend gender differences on the basis of their own cultural values and preferences. But as several observers have noted, culture not only shapes perceptions but also the allocation of resources. For instance, in societies influenced by fundamentalist religious beliefs, culture tends to create norms that restrict women's physical and mental space. Across social classes, girls tend to have less physical mobility than boys and thus less freedom to move to larger towns or other countries to continue their education. Norms of femininity and masculinity restrict their choice of fields of study and later their choice of occupations. Women receive less remuneration for their years of education than men. Finally, women tend to aspire to political positions of less prestige and responsibility than men.

Among poor families, especially those in the rural areas, the sexual division of labor is of fundamental importance. Because girls in poor homes and in rural areas conduct the bulk of the domestic chores, parents perceive school knowledge as moving their daughters away from essential tasks. In communities lacking basic domestic technologies (e.g., electricity, potable water, sanitation facilities, garbage collection), girls and women assume these services. Since the poor have less possibility of regular medical attention, typically women and girls must assume these services, which usually translate into special diets and rest for the ill members of the family. In indigenous areas of Latin America, it is women who traditionally weave the clothing for their families. This is an activity that demands considerable skill and time. Its direct and indirect consequence on the availability of rural girls for schooling has not been analyzed.

Poverty, in the Latin American context, also reflects itself in migration, from rural areas to major cities within the country or to foreign countries. Challenged by poverty, the cultural norm of women's restricted mobility has weakened. A major reason women migrate is to improve the quality of life for themselves and their families. In some cases, this is accomplished by taking menial jobs, in which case education levels are of relative unimportance. In fewer cases, women are forced to engage in prostitution, which, again, has no particular educational correlate.

While human capital assumes that salaries are a good measure of productivity, there is mounting evidence that women are given lower salaries than men for similar years of schooling. It has been asserted that women earn less because they are in fields that are less important and thus less well remunerated, but this is itself a reflection of societal values that discriminate against women's work. Another argument explaining these differences has been that women tend to work fewer hours than men, but a 1992 study comparing salary levels in terms of value per working hour found that women in urban areas earned between 66 and 80 percent of men's salaries with same levels of education in eight of ten countries analyzed.

Education certainly helps women, but studies conducted by CEPAL several years ago found that, on average, a woman needed four more years of education than a man to earn a comparable salary. It should be observed that this statistic was presented at that time as an interesting finding rather than as a major social problem. Education is statistically associated with sociocultural background and with income. The first association (sociocultural background and education) indicates that education is not completely meritocratic; the second (education and income) suggests that education nonetheless is an important tool for social mobility. Competition in the labor market is imperfect and, thus, women need to be protected by labor legislation if their education is to be instrumental to their advancement.

While far from a perfect correlation, higher levels of education generally lead to higher levels of income for women. On the other hand, improvement in the economic well-being of women does not necessarily translate into greater autonomy and decision making in the domestic sphere, especially concerning decisions over their own body. This disjuncture suggests that higher levels of schooling are not a sufficient ingredient to foster autonomy and self-assertiveness in women; thus, it would appear that there is a need to work on the content and experience of schooling to make education more responsive to women's feelings and practice of empowerment.

Highlighting the connection between poverty and women's education, the following points can be made:

1. Poverty is a strong manifestation of inequity in society but it is not the only one. Gender differences operate in extremely important ways and serve to create and sustain poverty in society.
2. In Latin America, men and women do not seem to show drastically different rates of enrollment and educational attainment compared to other regions of the Third World, but when analyses are made considering ethnicity and high levels of poverty, Latin American women are certainly at a disadvantage compared to men in terms of access to and completion of schooling.
3. Owing to the current course of technological development and the presence of foreign firms with greater sense of gender equality in many developing countries, some new opportunities are being opened to women, but gender inequity is not going away; it is being reinscribed in new ways. For instance, more women are moving into low-tech jobs regardless of social class.
4. In debating the demands for greater access by girls to schools, it is usually forgotten by policy-makers that what is actually learned in school tends to be quite gendered. Gendered knowledge is acquired via the formal and the hidden curriculum – conditions that exist in all schools regardless of the quality of schooling. There is very little research of an ethnographic nature documenting the lived experience of girls and boys in Latin American schools.
5. Contrary to the argument that it is quality of schooling that causes poor girls to drop out, poor girls are much more likely to leave school because domestic responsibilities at home do not allow them the free time necessary for schooling and because poor families must rely on the labor of their children from early years. Poor parents rarely know enough of what goes on in schools to be able to judge their quality. If quality were a factor, this would affect

boys more than girls, since it is the schooling of boys that tends to be seen as an investment. In some cases, the "relevance" of what is learned in school may be contested by rural families. The school's lack of relevance, however, is not prominent in decisions to take girls out of school.

6. It is incorrect to see women as merely one among several disadvantaged groups, next to rural, unemployed, street children, handicapped, etc. and to limit gender policies to the plight of poor women. This characterization ignores the gender dimension of disadvantage and sees it as a less ingrained and pervasive social distinction.
7. It is important to move away from identifying symptoms that affect the participation of girls in schooling and try, instead, to understand and correct the underlying causes of gender asymmetries in power. This implies a substantial use of feminist theory to move toward an understanding of the fundamental and interrelated causes of gender-based discrimination in society and an examination of schooling as a site where gender asymmetry is reproduced and yet may also be contested.

The Role of Governmental Policies

Education is considered a universal right in the UN Declaration of Human Rights. It is also a legal obligation since there is a convention that sustains this principle, the 1989 Convention on the Rights of the Child. Surprisingly, no state in the Third World has been sued by its citizens for failing to provide schooling to children, a right also enshrined in most constitutions.

In an ideal world, economic policies that protect fair wages and fair terms of trade for products and services would obviate the need for special measures to ensure the minimum social welfare of citizens. In other words, in a fair economic world, social policies would be redundant. But if the world is not ideal, compensatory policies and their concomitant programs for the poor are needed.

Several Latin American governments have enacted policies to address the question of equity. These policies include:

- Increasing subsidies and resources to schools for their day-to-day functioning (being attempted in Bolivia, Chile, Mexico, Peru)
- Lengthening the school day in schools that perform poorly in achievement tests and increasing the number of hours per week attending basic and intermediate education (carried out in Bolivia, Chile, Colombia, Costa Rica, Peru)
- Transferring [presumably trained and credentialed] teachers to critical areas
- Expanding school meals and scholarships (Chile)
- Developing field-oriented schools in various disciplines (scientific, technical, artistic)

As can be seen, all of these measures seek to increase the effectiveness and efficiency of schools. Yet they are gender-blind, focusing primarily on poor communities and their schools. To undertake analyses that examine the distribution of education only by income levels and to fail to look at finer studies that consider the compound effects of gender and ethnicity is tantamount to considering social class as the key determinant of social outcomes and to ignore the role of ideology (regarding gender, ethnic and "racial" differences) in the formation of social distinctions. The disregard of gender and "racial" variables has proved a major weakness in current theories of national development and social change.

Paradoxically, today gender equity is an accepted term and focus in public policy. There is new legislation on issues such as domestic violence, rape, and representation quotas favoring women candidates for public office. There are also numerous initiatives to foster awareness of the use of contraceptives and of the spread of sexually transmitted diseases. But in the area of formal education, there still prevails the narrow vision of looking at it as the provision of access for women, particularly to basic education. Schooling as a fundamental site for the formation of gender ideologies passes unquestioned and thus governments do not seek to reform its overt and hidden curriculum or to train teachers for non-sexist and anti-sexist practices. In fact, the first step in any kind of public policy development – the procurement of data – is missing. There is a serious need to acquire more data disaggregating gender by social class, ethnicity, and residence (rural/urban).

Two fundamental challenges to the successful design and implementation of public policies on gender come from within and outside Latin American countries.

The Challenge from Within: A Bifurcated Educational System

The imitation of upper-class norms has resulted in the existence of private schooling for groups who aspire to social mobility or who seek to keep their high status. In all countries of Latin America, there is a bifurcated educational system, with private elite schools catering to the wealthy classes and to middle-classes seeking higher mobility, and public schools serving mostly poor children. The higher-quality academic circuits function in a very closed manner, with entry usually beginning from pre-school in private and very selective institutions and moving into similarly exclusive universities. The continuous deterioration of the public school system (persistently subjected to very low resource allocations) has also led to the emergence of non-elite private schools, attended by children of middle- and low-income families. De facto, this means that public schools in Latin America increasingly serve poor children whose families have low leverage on the political system.

The Challenge from Without: Missing Global Equity

Attempts to solve the problem of poverty cannot avoid dealing with structural factors; otherwise, we will continue indefinitely the pretense of taking poverty seriously. To "alleviate" poverty, several Latin American countries have established emergency funds and social investment funds in areas of health, education, and water and sewage systems. These funds, which have been established at different times, from 1971 onwards, have had a limited role in establishing long-term anti-poverty programs.

To address structural poverty, certain changes are needed in the global market and would be complementary to other government sectors at the national level. In the case of Latin America, as is true for several African and Asian countries, the terms of trade that render agricultural products increasingly less valuable compared to technology-rich products place poor countries in a losing battle for the creation of national wealth. The burdens of excessive external debt further render national budgets very weak in social welfare. Unequal terms of trade create differential living standards across countries; with globalization, emigration of highly educated personnel out of the Third World is facilitated by constant demand in major industrial countries to enhance their industrial competitiveness. In addition to improving the terms of trade, DAWN – a major global feminist NGO – proposes: changing the taxation system and making its functioning more effective, engaging in agrarian reform, and fostering the existence of NGOs as active counter-hegemonic elements of civil society.

For compensatory educational policies to succeed, it is essential to affect other areas of the economy, particularly those pertaining to employment and health. Making the design of public policy even more difficult is the realization that labor-intensive growth strategies will benefit poor women only if efforts are made to address the sexual division of labor at home and in the marketplace. If no other social mechanisms for equalization obtain, problems of over-education, devaluation of educational credentials, and competition for education "goods" emerge. And if educational policies do not remain in place until a stable solution is attained, good efforts may be short-lived.

Political Action from Civil Society

The first ones to take on the politics of poverty seriously will have to be the poor themselves. This requires that groups within civil society must be organized to put pressure on the state to implement corrective public policies and to engage in self-support initiatives. To present a claim by pacific means requires a very strong knowledge foundation. One has to know the conditions that affect oneself as a poor person or poor group and the conditions that more privileged groups enjoy in order to develop some awareness of inequality and thus of injustice.

It has been remarked by some political observers and several feminists (activists and scholars) in the region, that the transition toward democracy in several Latin American countries was dominated by political parties and elite actors, a condition that, as a whole, has retarded the development of nongovernmental organizations and grassroots groups. In several cases, notably Chile and Argentina, women have been incorporated into the state bureaucracy but under the state's parameters that women should be professionals and technical experts, not advocates of feminist issues. International support for the more democratic states has been increased by withdrawing and transferring support from NGOs, including the women-led NGOs.

The potential for women-led NGOs to address formal education is significant if we recognize the multi-class composition of the feminist movement and its many organized groups. A major challenge for the feminist movement is to become more aware of formal education as a major political terrain and become more active in it.

International Cooperation and Gender-Sensitive Education

International agencies, with the collaboration of many NGOs, took a very positive step when they endorsed universal primary education, crystallized later in the Education for All Declaration, signed in Jomtien, 1990. While the declaration acknowledged that two-thirds of the illiterate adults were women and stated among its key strategies that "the most urgent priority is to ensure access to, and improve the quality of, education of girls and women and to remove every obstacle that hampers their active participation", the government and donor agency action that ensued was not sufficient to meet either quantitative or qualitative goals. The World Education Forum, which met in Dakar in April 2000 to renew commitment to EFA, reiterated commitment to formal education for women, stating as a [repeated] goal: "eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality." It remains unclear how the new timelines will enable countries to satisfy commitments not honored in the past.

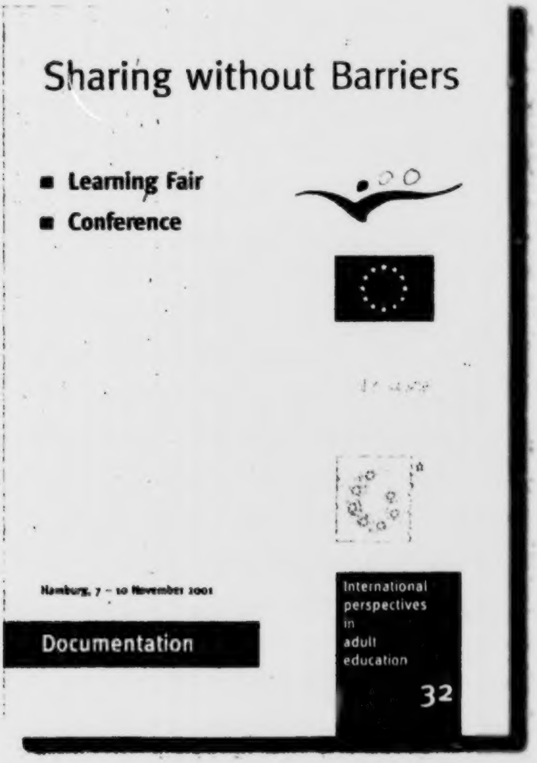
Literacy and adult basic education programs, which are those most likely to be needed by the poor, have received very little attention. Weakening the possibilities for transforming the educational situation confronting poor women is the fact that structural adjustment programs have also reduced national education priorities to cover only basic education and only for ages 7–14 years of age. This has been observed particularly in the case of Brazil, the Latin American country with the largest number of illiterates. Agencies such as the World Bank, which play leading roles in shaping educational policies in the Third World, have adopted a view that illiteracy is a problem of the past and that as long as we keep making younger generations more able to go to school, illiteracy problems will disappear.

Conclusions

Poverty is endemic in Latin America and affects a large segment of its population. While the region is more democratic than in the past, it has also become more unequal. With globalization, there has been a revival of the importance of education; this education is framed in terms of economic competitiveness, not social justice. In fact, however, the need for highly trained technical personnel may not create the atmosphere required to increase attention to poor and disadvantaged groups.

focus on poor girls have the effect of circumscribing gender problems only to the poor. Further, policies that concentrate on school access and completion, while reasonable from the perspective of social equality, leave the school untouched as a venue where undemocratic forms of femininity and masculinity are created and sustained.

Countries suffering structural poverty, such as those in Latin America, require a more comprehensive prescription. Education, as a form of socially legitimated knowledge, certainly helps individuals to obtain better jobs and higher salaries. But in bifurcated educational systems such as those characterizing the region, education brings disproportionately higher rewards to the wealthier social classes. For schooling to make a substantial difference in the lives of poor women, not only does it have to be redesigned but it has to be accompanied by measures in other sectors of social and economic life, some national and some international.



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After years of considerable neglect, education in Latin America is emerging as a major policy concern. This concern, unfortunately, is framed in terms of efficiency and evinces a narrow definition of quality. By no means is quality being defined in terms of developing civic understanding in youth and adults, not to mention understanding of inequities and inequalities in society. Under such circumstances, it must be concluded that new educational policies emerging in Latin America are gender-blind.

Problems of access and attainment are still present and affect mostly rural areas, most of which are inhabited by groups of Indian or African (in the case of Brazil) descent. Much work remains to provide them with complete primary schools of good quality. Nonetheless, the fundamental educational problem women face – whether poor or rich – concerns the unquestioned, non-problematized gender-biased nature of schooling. Educational statistics focusing on access are not only likely to be overstated but they fail to capture the dynamics of discrimination that girls and women continue to face in the educational systems of their respective countries in terms of their everyday experience and what is learned in school. In this regard, more studies based on qualitative research methods are urgently needed.

Governmental policies in education have tended to respond to demand forces, albeit mostly urban, for greater access to schooling. These responses have not met the ambitious quantitative goals set by Jomtien but have permitted greater participation by the poor. Simultaneously, the expansion of schooling has not been accompanied by explicit recognition of the underlying factors that create the disadvantage in access and completion of rural and indigenous women, and have not been characterized by interventions to modify significantly the gendered nature of textbooks, teaching, and the overall schooling experience.

Access, completion, and quality goals for the schooling of poor girls remain unfulfilled. While compensatory policies focusing on the poor make sense, as they prioritize the group most in need, policies that

Following the adoption of the recommendation for a multiparty system by the Presidential Commission on single or multiparty system in Tanzania in 1992, a number of non-governmental organizations (NGO's) have taken up the challenge of setting up a programme of education for democracy. Such a programme was presumed to be the prerequisite for a successful transition from the one-party, authoritarian system to political pluralism. The most active NGO so far has been Research and Education for Democracy in Tanzania (REDET). This programme was initiated in 1992 and is administered by the Department of Political Science and Public Administration of the University of Dar es Salaam. The Government of Denmark supports it through DANIDA. REDET aims to enhance the establishment of a strong foundation for democratic politics and democratic governance in Tanzania. Its intervention revolves around five mutually interlinked components, namely, research and publications, leadership development, civic education, democracy advocacy, and discussion fora (DF). This article focuses on the latter component and provides a critique of the DF strategy. The critique is informed by the results of impact evaluation research conducted in three pilot districts of Mtwara (Rural), Bukoba (Rural) and Pemba. Willy Komba is a senior lecturer and Head of Department of Educational Planning and Administration at the University or Dar es Salaam, Tanzania.

Willy Komba

Promoting Democratic Values through the Discussion Forum (DF) Strategy: Evaluation of its Impact on the Knowledge, Attitudes and Practices (KAPs) of Adult Learners in Tanzania

Purpose of the Research

In eight districts, discussion forums (DF) were set up at district, ward and village levels in order to provide an avenue for democratic dialogue. The DFs were intended to create democracy without insisting on ideology; to solve problems through discussion; to build tolerance and get citizens to do things for themselves; and to instil civic responsibilities, such as voting. Each forum meets six times a year, or more often depending on the felt need and pressing issues to be discussed.

The participants are adult learners drawn from each level identified among government officials, leaders of religious denominations and NGO's, political party chair persons, prominent business and other influential persons. Facilitators and recorders/secretaries, who are identified, trained and supervised by REDET, lead the DFs.

The research was inspired by the need to determine how effective the training workshops were in achieving the three tasks of REDET, namely:

- To assist society to unlearn and discard the quiescent or subject political culture;
- To impart knowledge on the workings of a multiparty system, and to imbue the public with democratic and participatory norms;
- To nurture the evolution of a democratic political culture, enhance citizen competence, and create conditions for meaningful and effective participation.

It was assumed that there was a deficiency in competence among adult learners, in terms of knowledge, attitudes and practices (KAPs) necessary for participating in a free and democratic society. Thus the study aimed at gauging the extent to which the training workshops and DFs caused some change in the desired direction.

Conceptual Framework

The REDET project is based on the assumption that the process of changing people's political culture from an authoritarian into a democratic one involves, among other things, the acquisition of appropriate knowledge, the changing of outlook (attitudes, beliefs, values) as well

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as practices (or behaviour) (KAPs) both at personal and at societal levels. REDET believes that knowledge about how the political system operates and about what one's rights, responsibilities and obligations are, is a precondition for responsible citizenship (REDET, 1997; Gross & Dynneson, 1991). Useful kinds of knowledge, therefore, include the following: knowledge of widely accepted principles of human rights and justice as enshrined in the Constitution of the United Republic of Tanzania; an understanding that personal, institutional and societal behaviours/attitudes and structures can have the effect of either promoting or denying social justice; and, knowledge of the current situation in which human rights are not recognised and social justice is not available to all, both locally and globally (Komba, 2000).

Another component of democratisation is the cultivation of dispositions such as criticism and self-criticism, respect for difference (diversity), tolerance, respect for truth/reasoning as well as respect for human rights, appreciation of the commonality between peoples, empathy with those who have been denied justice, commitment to defending one's own rights and the rights of others, ability to create positive change, and a readiness to take practical action which is appropriate to the learner's own situation (White,1989; Harber, 1991).

The acquisition of appropriate knowledge, coupled with the right dispositions, should enable people in a democracy to participate more effectively, in harmonious collaboration with others, regardless of the social differences that may exist between them arising from gender, colour, religious belief, political ideology or place of birth.

It is upon this conceptual framework that the training workshops and DFs were conceived as a strategy of promoting a democratic political culture, enhancing citizen competence, and creating an enabling environment for meaningful and effective political participation. This framework also guided the assessment of impact of the training workshops and the DF strategy. The major research question was: to what extent has the DF strategy been effective in changing the outlook of adult learners, in promoting democratic behaviour and in building self-confidence?

Methodology

In this evaluation, data on the effectiveness of the training workshops and the DFs were collected by using a questionnaire. The questionnaire was meant to collect data from a small sample of ordinary members of the discussion forums at ward, village and shehia levels. It was designed to collect information on attendance, level of interest in the discussion forums/training workshops, effectiveness of representatives (chairpersons/secretaries), topics covered during the workshops, and information on the impact of the discussion forums on the respondent's knowledge, attitudes and practices.

Men and women in a rural district of Bukoba dicuss issues on the quality of Education in their district *Photo: Willy Komba*

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Research Findings

Impact on Knowledge

Generally speaking, the quantitative data suggest that the impact was greater on the acquisition of relevant knowledge and on attitudes than on actual democratic practice. There was no significant gender difference in how the respondents perceived this.

With regard to knowledge, the data indicated that a total of 235 (64.9%) out of 362 respondents said the programme was very effective in changing their outlook. A greater percentage of men (70.2%) than of women (54.2%) perceived this to be so. The qualitative responses suggested that through the training workshops and the DFs, they gained new knowledge about democracy, they realised that they needed to learn more, and they also realised that to criticise a village leader for being irresponsible was not a sin. But what is even more important is that the leaders, at least according to what some respondents said, were now open to criticism and were very positive about it.

Impact on Behaviour

A total of 203 (60.8%) out of 334 respondents said the programme was very effective in changing their behaviour. There was no significant difference between men and women in how they perceived this to be the case. The respondents acknowledged that they were freer than before to speak their mind, that there was greater mutual understanding between leaders of different political parties; that they could exercise their freedom to choose their leaders more freely; that they could discuss political issues without any fear; and that the spirit of self-reliance through self-help activities had been revived thanks to the DF strategy.

Impact on Self-confidence

A total of 211 (57.5%) out of 365 respondents said the programme contributed greatly to their self-confidence. There was no significant gender difference in how the respondents perceived this. Repeatedly, respondents reiterated that they now had the courage and confidence to discuss different issues, both local and national, without fear. To quote just one example:

> *'We have the opportunity to criticise the rulers, namely the party and its government for its monopoly by providing them with constructive criticism.'*

Impact on Democratic Conduct of Affairs
A total of 180 (53.4%) out of 337 respondents said that the programme had a great impact on democratic practice. There was a noticeable gender difference in the perception. More men (57.5% out of 228) than women (44.9% out of 109) said the programme had a great impact on democratic practice. The procedural skills included the following: criticising leaders and peers without fear; using discussion to reach consensus; respecting the views of every member; co-operating in solving problems among village members and among political parties, and competing by the force of reason rather by the reason of force or violence.

However, as regards the impact of the programme on the acquisition of democratic skills there was no significant gender difference in the respondents' perception. About 53.7% (out of 121) women said the programme contributed greatly to the acquisition of democratic skills, while 52.3% (out of 243) men had a similar opinion.

A total of 252 (69%) respondents said the programme greatly stimulated discussion of national issues. There was a slight gender difference in how the respondents perceived this. About 70.8% (out of 243) men said the programme greatly stimulated discussion of national issues, while 65.6% (out of 122) women had a similar opinion. It was alleged that the programme contributed to the reduction of open corrupt practices, the revival of self-help schemes, and the establishment of local civil organisations, such as the elders' council. One respondent summarised the impact with the following words:

'The discussion forums have greatly promoted the freedom to speak, to criticise and to participate in activities without fear, recognising that this is a right of every citizen.'

Emerging Issues and Lessons for the Future

One conclusion that can be made about this assessment is that the majority of the respondents perceived the programme to be very effective in changing their outlook, their behaviour, self-confidence and democratic conduct of affairs. This great achievement for REDET needs to be sustained. On the basis of these findings, it is, therefore, recommended that the training workshops be extended to more districts in the country.

However, owing to the manner in which the data gathering instruments were designed, it has been difficult to assess the differential impact of the programme on various categories of participants other than by gender. If additional information about the participants' level of education were asked for, an analysis of the data by level of education of the participants could provide more insights into the educational needs of the respondents. Such information might be useful in designing future programmes that cater for the specific needs of learners.

It may be helpful in future to distinguish between formal training sessions and the less formal discussion forums. While in the former scenario streaming might be desirable for enhancing the impact of the training workshops (particularly with regard to the teaching of new, graded knowledge), in the latter scenario the participants may benefit more from the diversity of educational backgrounds and corresponding ways of looking at social and political issues.

As much as possible, facilitators should use participatory approaches in the delivery of the formal lessons. Research evidence has shown that co-operative, interactive teaching and learning strategies are best suited for the promotion of cherished democratic values.

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For many years the Socio-Economic Institute (SEIN) of Limburg University in Belgium has organized different mentor programmes. The programmes are highly valued by the different stakeholders: the mentees (participants), the mentors, the companies and the promotors (Ministries, European Social Fund). The project has been selected as "best practice" in Flanders in a research study by the European Commission. Nowadays international cooperation is more focused on technical assistance and capacity building. As mentoring is an important tool for empowerment and as women in developing countries are looking for capacity building systems, it was interesting to explore and exchange our programmes with a university in the South. SEIN therefore developed a mentor programme to promote the empowerment of women in the labour market in Cuba. The University of Pinar del Río is the partner in this project. The project consists of developing the programme, foreseeing logistical support and working out a manual, so that afterwards the local university can continue the project by itself. The cooperation will be part of sustainable development within the empowerment of women. In the following sections, the background of this project, the methods and the objectives are given. This information can be used by other organizations to exploit their activities around mentor programmes for women, as a way of empowerment. Janneke Jellema is Project Manager at the Socio Economic Institute (SEIN) in the Limburg University, Belgium. Magdalena Mazon Hernandez is Project Manager at the Universidad de Pinar del Río in Cuba.

Janneke Jellema / Magdalena Mazon Hernandez

Empowerment of Women in Cuba: Experiences of the SOFIA Mentor Programme

1. Problem Analysis

Every phase and position of people in society, from primary to adult education, is based on learning. The three E's, education, employment and empowerment, are dependent on lifelong learning. 'Learning' as such is a broad concept and can therefore be divided into informal and formal learning. Informal learning is most common: learning by experience, learning at the coffee table, learning from discussions and learning by 'role models'. Informal learning is structured and designed into formal learning.

Personal contacts and networking are an important base for learning, especially in professional life. Traditionally, there are different ways within our cultures for men to meet on a formal or informal base: at the pub or at the footbal match. Within these groups or networks you can see the effect of discussions and the exchange of experiences, which results in a coaching or mentoring process by the senior participants.

These processes are more difficult for women. Until now, female entrepreneurship and management has not been a common thing. An older generation of 'role models' and a long tradition of networks hardly exist.

Research has shown that the promotion of women in management and entrepreneurship, in the profit as well as in the non-profit sector, still stays behind male colleagues. Also, the percentage of women in a political and decision-making function lags behind. In financial respects, jobs for women are underestimated in comparison with equal functions occupied by a man.

The Socio-Economic Institute (SEIN) has been organizing different mentor and management programmes to stimulate the empowerment of women. In our training programmes we present informal and formal ways of learning. The objectives are to promote entrepreneurship and management positions for women in the profit, the non-profit sector and in politics. The projects have been subsidized by the European Social Fund and the Flemish Government.

2. Methodology

The mentor programmes of SEIN have the aim of optimizing and broadening the professional development of women by theoretical input, by training in personal and professional qualities, by personal coaching via mentoring and by offering a broad network. It can be seen as a concept of 'lifelong learning' for adult education because it is focused on different target groups. The projects can also be seen as an important instrument of the empowerment of women. SOFIA: the goddess of wisdom, is the name of the concept. The method is based on four 'tools': mentoring, training, networking and train-the-trainer.

2.1 Mentoring

Mentoring is a natural education method that in an informal way is integrated in our daily life. In professional life, mentoring is used more and more as a specific training method.

Mentoring can be 'one to one' coaching, the guiding by a mentor of a small group of participants, or the combination of these two aspects. An experienced female manager or entrepreneur shares experiences with 'mentees'. The mentor and mentee meet on a regular basis (monthly or even more often) organized and prepared by a co-ordinator. Even outside the meetings the participants can contact the mentors or co-ordinator for advice and support.

After basic education there does not exist a lot a space for adult education during the employment phase. Most of what we learn is in practice and by learning 'on the job'. The exchange of information and the experiences of a female 'role model', the mentor, are therefore of ultimate importance.

In the individual mentor programme the mentor and mentee meet on a regular basis. They have to construct their meetings based on checklists and monitoring by a co-ordinator. With a structured process, the co-ordinator can follow the development and can make sure

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that meetings do take place, with a useful purpose. Disintegration of the meetings can thus be prevented.

Within the group programmes, the mentors and mentees meet every month. They are prepared with a strategy and thesis discussed with the mentees. The discussions and exchange of experiences (the mentoring) take place within a framework of training sessions.

2.2 Education and Training

The education within the mentor project is based on informal and formal learning. The training functions as a framework for the mentoring process. The programmes contain interactive training sessions based on the demand of the participants. Topics related to management and entrepreneurship are presented.

The training programme is designed in narrow co-operation with the participants by analyzing their learning goals. That means that the education programme is not strictly defined before starting the project. Hence the co-ordinator organizes a personal interview with the candidates. The aim of this meeting is to make a needs analysis of the target group, to measure the background, the expectations and the learning goals of the participants. The personal meetings also give a stimulating effect to the participants before starting the programme. During the programme continuous monitoring and evaluation of the learning goals and coaching of the trainers and mentors take place. Hence the training sessions can really be organized ‘tailor made’ with a strong participatory method.

The training consists of interactive sessions based on a topic and introduced by a qualified trainer. The framework provides for the mentoring process and the exchange of experiences. Each session contains a theoretical and a practical part to make a link with the experiences of the participants.

During the practical training the group is split in discussion groups to “receive the mentoring”. The mentors have an active role, because they manage the group and assist them in solving their problems. The group work is very important for the exchange of experiences and the mentoring.

Besides training sessions, excursions are organized to the companies of the women entrepreneurs. Furthermore the participants are informed about interesting topics via a newsletter. The project management permanently offers documentation material and personal feedback and support.

2.3 Networking

Together with training and mentoring, functional networks are created. On the one hand the mentors and trainers open their networks. On the other hand strong networks are created within the group of participants. The network and group process is of great importance for the discussion and exchange of experiences during the training sessions.

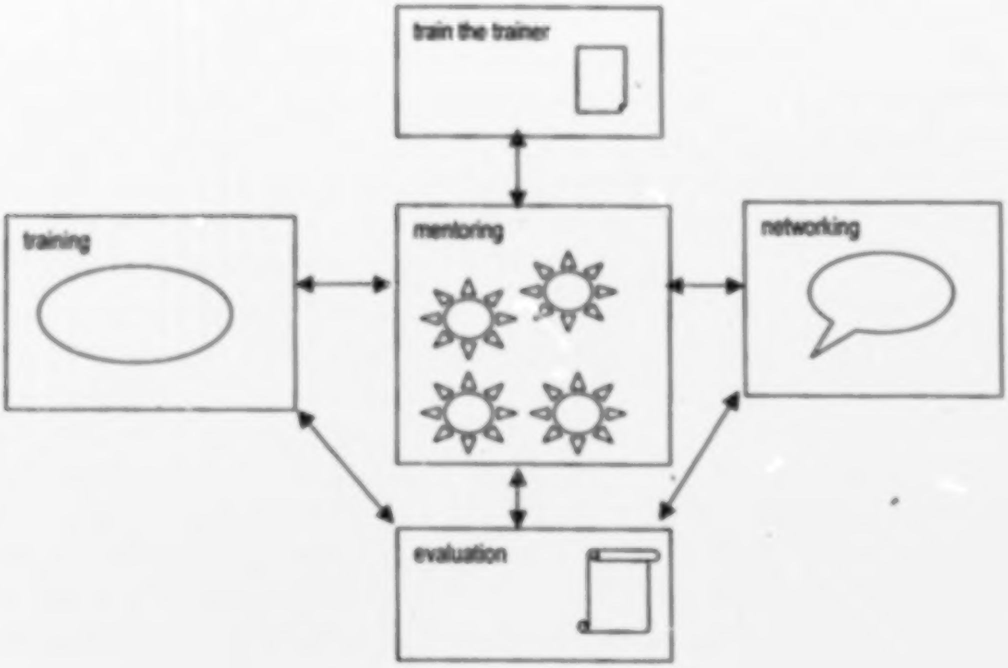
The network provides a platform of colleagues who are active women in the labour market. It is a stimulating forum for the empowerment of women. Together with the mentors, the women support each other, they challenge and they provide vision. SOFIA acts as a 'sounding board' where women recognize their problems and experiences. Within the platform they can look for 'best practices' and solutions. The participatory and personal development within the network is very important. Hence the programme has an interactive, experimental and reflexive learning method.

2.4 Train the Trainer

An experienced manager is not automatically a good mentor. In addition, a manager will not spend time and energy as a mentor if there is no win-win situation for her. The mentoring is an important pillar for the project. The mentor functions as a 'role model' for women in the labour market. For the participants it is important that they can identify with this mentor and that she really is a 'living example'. The qualifications and the enthusiasm of the mentors determine the success of the coaching. Therefore an interesting train-the-trainer programme is presented to the mentors.

Mentors are shown that they are also learners. Mentoring gives a win-win situation, because they receive interesting reflections on their own careers and work fields. Furthermore the mentor creates a relation based on trust with the mentees because professional and personal items are discussed. The programme gives her also publicity, broadening of her network and contacts with a new generation of women. The 'Train the trainer' shows the win-win situation, informs about aspects of women in the labour market and diversity management and shows 'best practices' of mentoring.

The following flow chart gives an overview of the methodology:



3. The Economy in Cuba

Cuba is a middle income country and since 1956 a socialist republic. Because of international isolation and because of the economic crisis,

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the constitution was reformed in 1992. In 1996 the BNP in Cuba grew by 8%. The economy is slowly moving towards a more liberal economy. The American dollar has become a legal currency. 75% of the state farms have been transformed into co-operatives with strong independence. Hence the economy is changing from a planned economy to dynamic management. Within this process new skills and knowledge are necessary to participate in the labour market and to fulfil a management position. The mentor project contributes to this change and focuses on these skills by training and an exchange of experiences.

According to UNDP, education and health care are the most important indicators for the quality of life. Referring to these indicators, Cuba obtains a rather positive score on the Human Development Index (middle income country 0.7 – 0.8 HDI). As education is an important tool for development and the education sector in Cuba is well developed, it is useful to organize a project in this sector.

4. The Target Group

Over the past two decades women's place in the labour market has been a constant concern for policy design in many countries around the world. We can identify three main reasons why women deserve a place in male-oriented economies:

- self-recognition of their professional capacities
- necessity of income sources for daily life
- organizations with a more equal personnel policy are more innovative

These criteria confirm that regardless of geographical area, women are part of society not only in their role as wives or mothers, but as active members of the labour market.

The participation of women in the labour market in Cuba has been increased. Depending of the sector and the country, the participation of women in the labour market in general is about 40%. This percentage is valid for developed countries as well as for a middle income country like Cuba.

If we have a look at the percentage of women in management this is much lower. Depending of the sector and country, the participation is more or less 10%.

Although the education of women is strongly increasing and the amount of girls within higher education is almost 50%, the move up the career ladder lags behind.

The topic of women in management was also part of a Latin American conference, in co-operation with UNICEF, the *Centro de Estudios de la Mujer* (CEM) and the *Federación de las Mujeres Cubanas* (FMC). Here again it is shown that women don't participate suficiently in decision making processes. The consequence is that women take less part in the decisions, the implementation and the planning of the development of a country.

5. Women and Adult Education

During research we have seen that the participation of women in the labour market in Cuba does not differ that much from in Belgium. The representation of women in the labour market is about 40%. The representation of women in management is about 10%. Both countries are concerned about equal opportunities in the labour market. Policy measures have had several effects. But via policy measures only, the effect won't be completed because a lack of networking for women is still a problem.

The empowerment of women is an important tool within development cooperation. Capacity building and training for women are an important necessity. Women need space and opportunities to develop their leadership skills and assertiveness, to establish an action agenda that focuses on their needs. It also shows that women can only be self-confident and autonomous in their economic activities if no cultural restraints hold them back. Training is here an important tool to promote women's equality in the economy.

After traditional secondary or higher education, women need opportunities to re-train and upgrade their skills, and to continue their access to vocational and career guidance. A way to organize this is via mentoring, networking and training. Until now a combination of these factors doesn't exist within the empowerment of women. Within the changing process of the Cuban economy, it is time to take the opportunity to acquire new skills to improve the position of women in the labour market.

6. Women and Mentoring = Netlearning

The integration of women in management has less to do with basic education. A middle income country such as Cuba, scores well on the Human Development Index. This means that basic education is available. Besides, primary, secondary and higher education in Cuba are free for everybody.

Research has shown that there are other reasons for less representation of women in management. In one way this has to do with empowerment and human resources. It has been shown that there is a lack of female role models (mentoring) and networking.

Social contacts are of great importance for the personal and professional development of men and women. Traditionally men have different ways to meet and to participate in mentorship or 'godparentship' for younger men. For women this is more difficult as there doesn't exist a tradition of women in management. There is a lack of women 'role models' who function as a mirror, reflexion and sounding board.

Furthermore networking with colleagues or with superiors is an important way of developing a career. It is necessary to exchange experiences and to stay involved in different (mostly informal) communication lines outside the formal circuit.

In some ways lack of women in management exists because of the absence of management experience and training. Management qualities are learned by practical training and learning “on the job”. Therefore management training based on a needs analyses with a particpatory approach is necessesary. The combination of learning and networking with mentors can be described as netlearning. This is learning within and from an interactive network of participants.

7. Policy Environment

The representation of women in the labour market in Cuba does not differ much from that of women in the European Union, in spite of the differences between the economies.

Equal opportunities for men and women began in Cuba already in 1959 and it still is a policy priority. The elimination of all forms of discrimination against women constitutes a major goal of the Cuban Government. Its legal and practical implementation remains under constant review by the Government and is followed by the *Federación de las Mujeres Cubanas.*

Relevant ministries and institutions have developed programmes to change socio-cultural patterns of conduct among women and men. There are also programmes to educate women about exercising their rights. Efforts are made to provide more training for women and opportunities for redeployment.

It is important to recognize the role that non-governmental organizations have played for decades. The most important one is the *Federación de las Mujeres Cubanas* (FMC). The FMC is recognized by the constitution as the responsible body for promoting policies for the advancement of women. The FMC represents a large proportion of women in Cuba. 85% of Cuban women are members of the FMC.

With this position they enable and influence government policies and decisions. The FMC is represented in all the regions of the country, even at local level. It organizes seminars and lectures about topics related to equal opportunities. Hence the FMC plays an important role in the empowerment of women.

8. The Project Partners

The project partners within the SOFIA mentor programme consist of two universities. The Universidad de Pinar del Río in Cuba and Limburg University in Belgium are relatively small universities. Both universities have a strong regional accent in the agricultural provinces of the country. Besides, both institutes have a lot of experience in adult education and research. They organize different training courses about gender, personal effectiveness and human resources management. The main research topic is women in the labour market. Equal opportunities and empowerment of different target groups is their mission. Thanks to the similar characteristics of the organizations, the partnership is a fruitful project in exchanging knowledge and experiences.

The *Federación de las Mujeres Cubanas* (FMC) is a third partner in the project. It is important to work with a local partner which is well integrated in the community and the target group. The co-partner may also be a representative of the SME's, for example a Chamber of Commerce.

9. Experience of the Participants

The experience of the participants, mentees as well as mentors, is positive. Mentors and mentees have recognized that this kind of programme is useful for women of all enterprises. They learn about different management styles and they can compare their situation with each other.

Many of the women recognized that they did not have a formal role model in their personal career. Some of them identified relatives, partners or colleagues who played an informal role. But most of them found role models, an exchange of experiences and a stimulating platform within the SOFIA programme.

The women also admitted that SOFIA differs from traditional training courses. There is a participatory approach, a personal contact and exchange among junior and senior women. This gives a very stimulating feeling of trust and familiarity and a sounding board for women in the labour market.

All of the participants recognized that the SOFIA programme has been an important forum of reference in their career. At the beginning of their professional lives, the women did not realize the importance of gender in management, as they had not faced the issue at lower level. Only when women are involved in management activities, do they realize that there are barriers in a male-oriented environment unaware of stereotyping, visibility, performance pressures and 'clone effects'.

The SOFIA women were also positive about the combination of mentoring, networking and training, because the training functions as a framework for the discussions. Furthermore the participants evaluated that SOFIA gave reasonable to high consideration to the following learning goals:

- to look for 'best practices' in a stimulating forum
- to improve professional functioning and broaden the network
- to recognize problems and experiences by other women
- to enlarge personal skills by training and mentoring

The mentors are important actors in the process. They realized that the programme was a win-win situation for them. The mentors participated because it gave them a reflection on their work field. They shared experiences with the other mentors and with a new generation of women managers. Mentors are experienced managers who function as a 'role model'. Literature gives different criteria for being a good mentor. The mentees agreed with these criteria and they considered the characteristics of mentor to be as follows:

- is a confidential listener and has an 'open mind'
- is willing to share experiences and gives advice
- creates a positive environment for development
- functions as a stimulating role model
- is aware of commitment and encouragement

10. Results

The project has specific objectives with this mentor programme. SOFIA aims to reach different objectives. The following results are strived for:

- improving the position of women in the labour market in Cuba
- enlarging the skills and qualities needed for a leading position
- enlarging self-awareness and confidence and improving personal effectiveness
- offering a sounding board and forum
- offering exchange of experiences and career guidance
- raising awareness about the situation of women in the labour market
- providing knowledge and logistical support
- providing a manual for further implementing of mentor programmes

11. Critical Success Factors

After finishing the project we will report the final evaluation. Within this report we will also handle the critical success factors. Until now the following factors have been identified.

In the first place the mentoring is a critical success factor. The leading women function as mentors and 'role models' for the mentees, by explaining their own experiences. The intense personal contact between the mentor and the mentees creates a trust relationship in which advice, experiences and tips can be exchanged.

The co-ordination as a framework will influence the matching and the contact between the mentor and the mentees. A good preparation for the mentors in the 'train the trainer' programme will make the mentors enthusiastic for their task. As a preparation for the mentor, it is also important to give a strategy and a thesis before the training session. Besides, mentors are only interested in participating if there is a win-win situation for them. So also for them training and learning aspects have to be presented.

Secondly the coaching and stimulating of the trainers or facilitators during the training is important. The training is the framework for the mentoring process. The training is based on the needs analyses of the participants. Therefore it is very important that the trainers know exactly the expectations of the participants. The programme is discussed with the individual teachers based on the learning goals of the participants. The participatory approach enlarges this effect.

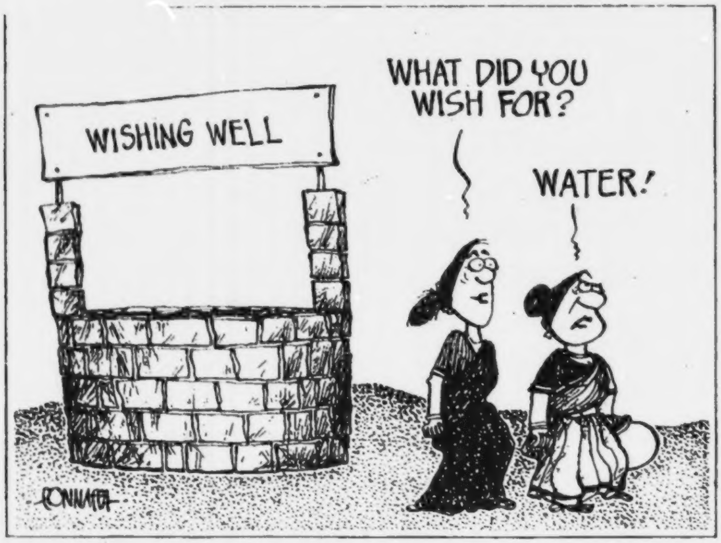
Finally the logistical part can be a critical success factor. It is important to organize a location or classroom that all the women can reach easily and where they can meet each other. In addition didactic material such as paper, writing materials and blackboards are useful to facilitate the sessions and to promote the mentoring process. Finally, communication material to inform the participants about the programme, the agenda and the topics would be useful. To inform the participants in advance is a strong motivating factor for their participation.

12. Monitoring and Evaluation

Evaluation and monitoring are an important part of the project. Continuous evaluation at all levels and good co-ordination of all meetings will influence the critical success factors. Every session is evaluated. Evaluation meetings with the participants and the mentors monitor the programme. And finally an overall evaluation is made. This material is used to prepare and coach the trainers and mentors, and to monitor or change the programme if necessary. The evaluation and experiences of all the stakeholders in the projects (mentees, mentors, trainers, and partners) are determined in order to improve the mentor and network programmes. An overall evaluation of different programmes is based on the following indicators:

1. number of participants and number of drop outs
2. evaluation per session based on content, presentation and exchange of experiences
3. final evaluation for the mentees and the mentors in terms of achieving the learning goals
4. evaluation by the mentors concerning the evolution of the mentees and their own learning
5. monitoring and evaluation through the experiences of the steering committee

SEIN is managed by Prof.dr. Mieke Van Haegendoren, full professor at Limburg University. For more information you can contact: drs. Janneke Jellema MA, Project Manager, Socio Economic INstituut (SEIN), Limburg University, janneke.jellema@luc.ac.be, http://www.luc.ac.be/sein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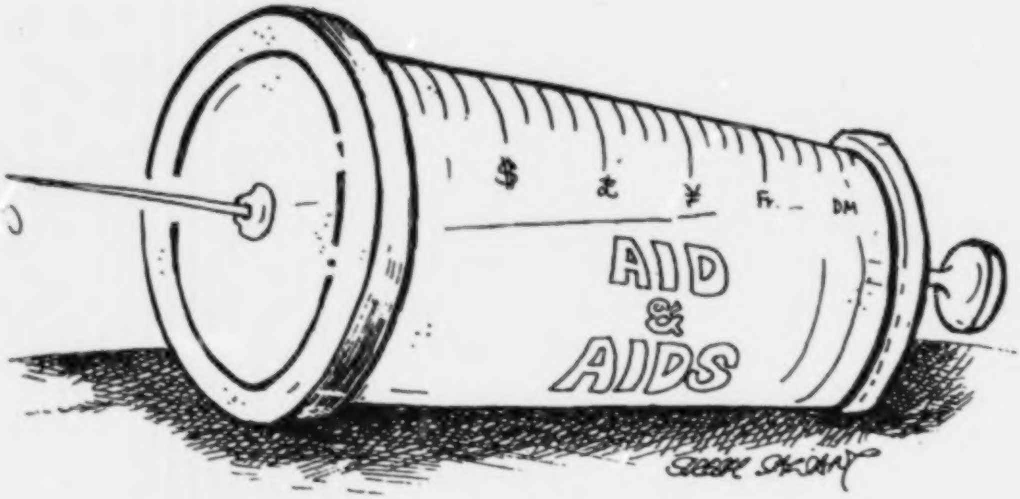
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The number of people suffering from AIDS continues to rise, especially in Africa. Women are particularly at risk. Evelyn Appiah-Donyina explores the gender issue, describes fully how women are affected in various ways and suggests what role adult educators can play in combating this disease. The author works at the Institute of Adult Education (IAE) at the University of Ghana and has already contributed a number of papers to this journal.

Evelyn Appiah-Donyina

Gender Impact of HIV/AIDS/STIs: Some Implications for Adult Education Practitioners in West Africa

Introduction: What is Gender?

There are two basic differences between women and men; these are Sex and Gender. Sex is the physical, biological difference between women and men. It refers to whether people are born female or male. Gender, on the other hand, is not physical like sex. Gender refers to the expectations people have from someone because they are female or male. Gender attitudes and behaviours are learned and the concept may change over time. In short, we can say that sex is biologically determined and gender is socially determined.

Adopting a gender focus to developmental issues is the result of the realization that women often do not benefit from development activities and in several cases become poorer and more marginalized. One may say that the ultimate goal of gender and development is to achieve gender equity.

Some Key Gender Concepts

Gender Approach: This refers to the attempts made to give equal opportunity to men and women, where men are made to share the burden and recognize women as equal partners.

Gender Awareness: This is used to describe the situation where people are sensitive to the needs and interests of men and women in the implementation of an activity.

Gender Role: This refers to the duties and responsibilities attached to the positions occupied by males and females in society. Roles can change according to the geographical, social, economic and political environment. Gender roles refer to expectations regarding the proper behaviour, attitudes and activities of males and females. As adult educators/social catalysts there is a need for us to recognise that in most West African societies low-income women have a triple role: women undertake reproductive, productive and community managing activities, while men primarily undertake productive and community activities.

Sexual Division of Labour: The way work is allocated and valued according to whether it is performed by women or men. Globally, feminists argue that in the world economy women are the most exploited workers as a result of the sexual division of labour.

Socialisation: Socialisation refers to how people are taught to accept and perform the roles and functions that society gives to them. Men and women are socialised into accepting different gender roles from birth. Establishing different roles and expectations for men and women is a key feature of socialization in most societies.

Stereotyping: It is based on prejudices and fears about certain social groupings usually seen as inferior to the dominant group. Individuals are then judged according to their group identity. In other words, the belief that all people that belong to a certain group – gender, age, or tribe – do, or should, act alike.

Gender Sensitivity: It refers to awareness that there are both biological and gender differences between women and men. Also that women and men in different parts of the world have been gendered in different ways. Gender sensitivity also means building a critical edge to counter the gender oppression that we have been socialised into.

Gender and HIV/AIDS/STIs – The Problem

The first official report of the disease now known as AIDS (Acquired Human Deficiency Syndrome) was published on 5 June 1981. The one-paragraph report by the US Centre for Disease Control catalogued five cases. That was about 21 years ago. The epidemic has since spread to every corner of the world. Reports indicate that almost 22 million people have lost their lives to the disease and over 36 million people are today living with the Human Immune Virus (HIV), the virus that causes AIDS. It is a known fact that the majority of People Living With AIDS (PLWAs) can be found in Africa south of the Sahara.

Failure to significantly contain rising rates of the global AIDS pandemic has led to the rethinking of earlier response strategies to the infection. It is generally accepted that 80% or more of all HIV/AIDS infections can be traced to unprotected sexual intercourse. There is a need for a gender-based response that will focus on how the different social expectations, roles, status and economic power of men and women affect and are affected by the epidemic. The above implies that it is these relationships, together with physiological differences, that determine to a great extent women's and men's risk of infection, their ability to protect themselves effectively and their respective shares of the burden of the epidemic.

It has been argued that HIV prevention is a gender issue since seroprevalence rates tend to be much higher amongst certain groups of young women. Furthermore, the responsibilities of care for AIDS patients often fall on women, and the role of women in child care means that their health is especially important in ensuring continued reductions in child mortality and reducing the number of orphaned children. There is therefore a need to place special emphasis on the education of girls and women about risk patterns and safe practices, alongside efforts to encourage men to be better informed and adopt patterns of behaviour that reduce the spread of HIV.

By promoting a culture of rights and gender equality, responsibility and choice in relation to HIV/AIDS, adult educators can play a meaningful role in ending women's overwhelming biological, social and economic susceptibility to HIV and can affirm the right of all people to life and dignity.

Physiological Vulnerability of Women and Men

Evidence from research suggests that women's risk of HIV infection from unprotected sex is at least twice that of men. A woman's body has the ability to retain a high concentration of semen in the vaginal canal. Similarly, women are exposed to infection because of the extensive surface area of mucous membrane in the vagina and on the cervix through which the virus may pass. Uncircumcised men are also at risk because the delicate area under the foreskin may expose them to infection if they have unprotected sex. Young women are at a greater risk because of abrasions they may have during unprotected sex since they tend to have a thin vaginal lining.

Sexually Transmitted Infections (STIs)

STIs in women tend to be asymptomatic (they go unnoticed because they are internal). Unlike men, women may experience no pain initially and are thus less likely to seek prompt medical treatment. The situation is often compounded by the stigma attached to STIs, inaccessibility to clinics, lack of money, negative attitudes of health workers to infected women and women's own preoccupation with too many domestic responsibilities. The World Health Organisation (WHO) estimates that at any point in time there are as many as 330 million curable STIs worldwide. This calls for much concern, considering the fact that the condition predisposes infected individuals to HIV/AIDS.

Cultural Practices

Some cultural practices aggravate women's physiological risk of HIV infection. Examples are men's preference for "dry sex" (often with the active connivance of women), "rough sex" which may lead to sores in the mucous membrane, and female genital mutilation, which could lead to extensive tearing and bleeding during sex. The practice of widow inheritance has also contributed significantly to the increasing rates of infection.

Other Gender-related Vulnerability and Obstacles to Prevention and Coping

(i) **Male sexual dominance** – Most often, where sex is concerned, everything is centred on the pleasure of men. The practice tends to neglect females' needs and to inhibit open discussion between couples about safe sexual behaviour.

(ii) **Economic vulnerability and sexual services** – Women's economic dependence makes them vulnerable since training and economic opportunities are few. Some women may exchange sexual services (barter) for money, jobs, promotion or other privileges.

(iii) **Control over sexual relations within and outside the marriage** – Lack of control over sexual relations within and outside marriage because of polygamy, multiple sexual partners, etc., could expose couples to HIV/AIDS infection.

(iv) **Violence against women** – This takes the form of rape, defilement, and violent or coerced sex. Unfortunately, these negative practices have become commonplace in our part of the world in recent times. In some communities, marital violence is condoned.

(v) **Blame and rejection** – Gender stereotypes allow women to be blamed for spreading HIV/AIDS. Often women are the first to be tested because of pregnancy, a sick baby, etc. When found positive, they are the first to be blamed.

(vi) **Lack of information** – Many women have a poor understanding of their own bodies, mechanisms of HIV/STI transmission and their level of risk in unprotected sex. Many men also lack adequate information about their own bodies and tend to have even less information about women's bodies and needs.

(vii) **Interpersonal communication** – Research has shown that young people prefer that their parents talk to them about sex. Poor communication between parents and children and between partners about relationships, male and female sexual needs and responsibilities can lead to risk behaviours on the part of young people and adults alike. For example, young people of either sex should be given negotiation skills to enable them to counter pressure from peers and older persons to indulge in early sex.

(viii) **Family stress** – It has been said elsewhere that the AIDS pandemic, if it does not infect you will affect you. The impact of AIDS on the family can be devastating. Apart from the toll it wreaks on the family's resources, AIDS-related stigmatisation and the extra burdens of care brought by the disease have to be contended with. This tends to worsen existing gender inequalities, increasing women's vulnerability and exploitation. For example, girls may be withdrawn from school to look after family members. Older people who should be enjoying their retirement also have to help with the care burden by providing for AIDS orphans. We must view this in the light of the already serious poverty levels existing in West Africa.

Some Suggestions for Changing the Status Quo – The Role of Adult Education Practitioners

Gender-sensitive strategies are needed to decrease men's and women's vulnerability to infection, reduce stigmatisation and discrimination and curb the epidemic's socio-economic impact. Shared responsibility for prevention and care between women and men is critical to the entire process. Below are a number of strategies that could help to change the existing situation with regard to HIV/AIDS/STIs:

Advocacy Strategies

Ideas and social norms that keep women in inferior social positions must be challenged. As much as possible, adult education practitioners should strive for structures that will give women equal access to education, training and income-earning opportunities. There is a need for governments of West African countries to ensure that broad-based national policies on HIV/AIDS are formulated. These should mention in clear terms what each country considers as unacceptable human rights abuses, with particular reference to the perpetration of harmful and oppressive social practices that militate against the general well-being of women and PLWAs.

A national policy should also cover issues like availability of formula/breast-milk substitutes for HIV positive mothers, free access to HIV testing as well as pre- and post-counselling services.

Laws ought to be put in place by governments to strengthen and expand women's democratic rights. In Ghana, for example, the Intestate Succession Law (PNDC Law 111) spells out clearly how the assets of a spouse who dies without preparing a will should be divided among surviving dependants. To a large extent this Law has provided some respite to widows and their children who otherwise would be thrown out of their homes on the death of their sole provider. There is a need for governments to ensure the full implementation of such laws to raise the status of women in reality and not just on paper.

All stakeholders in the fight against the spread of HIV/AIDS must create a compassionate and enabling society in which women and men assert their equal right to life by freely exercising responsible choices for prevention and treatment. Adult educators and other gender advocates on their part should challenge unequal gender relations and the gender subordination of women in all institutions. They must encourage open discussions about gender power relations and HIV/AIDS.

Educational Strategies

Basic information about HIV/AIDS and STIs should be made available to all persons, whether young or old. Adult education materials should be simplified for literacy learners. All stakeholders must promote the message that apart from abstinence and mutual faithfulness, safe sex is the only good sex. In most African societies men tend to be the dominant sexual partner. Condom use must be encouraged and it must be seen as both men's and women's mutual responsibility to demand condom use and protection.

It is important to strengthen efforts aimed at countering the belief that AIDS is a "women's disease" by stepping up male involvement in reproductive health programmes and by encouraging all men to assume mutual collective responsibility for the spread of the disease and to see the urgency of its prevention for their families, their communities and their country. More often than not reproductive health programmes are targeted at women even though the final decisions regarding sex and use of contraceptives rest with the men.

Social Support Strategies

There should be shared decision-making power between women and men at all levels: in relationships, community affairs, political and economic structures. Affected families must be provided with backup support for home-based care. This ought to include subsidised medical care and counselling. Effective strategies for caring for people living with HIV/AIDS must be put in place, in a manner that ensures that women do not bear a disproportionate burden of caring for those who are HIV positive, neglecting their own health and becoming even more marginalized economically.

Cultural practices that can assist in HIV/AIDS prevention such as premarital virginity for both boys and girls must be encouraged. Even for those who are sexually active already, the advantages of secondary or tertiary virginity must be stressed.

Conclusion

There is an urgent need to strengthen the coping capacities of families in order to reduce fear and stigma round HIV/AIDS and to allow prevention strategies to really work. It is important for adult educators and other stakeholders to help create a compassionate and enabling society in which women and men assert their equal right to life by freely exercising responsible choices for prevention and treatment. They must also endeavour to integrate a gender perspective into all HIV/AIDS/STI programmes.

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Consumo
Biolog

Quiché woman learning embroidery to manufacture blouses

Photo: Ursula Klesing-Rempel

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To mark the tenth anniversary of the opening of the IIZ/DVV Project Office in Mexico, Ursula Klesing-Rempel, who has headed the office for many years, gives an overview of project activities focusing on adult education in Indian communities. In a country with 56 Indian peoples, the work takes place against a background of cultural diversity, great poverty – especially among those very peoples – and under-representation of women in educational activities.

Ursula Klesing-Rempel

10 Years of Project Activities in Mexico

Review of the Adult Education Project

The Mexican Adult Education Project of the Institute for International Cooperation of the German Adult Education Association was launched in 1992. Integrated adult education activities are carried out in Indian communities as part of *"Support for the Social Structure in Developing Countries"*.

The cultural diversity of the country is evident from the presence of 56 different Indian peoples. They all live in poverty or extreme poverty, have low levels of formal education and, depending on the degree to which they have become acculturated over the centuries, retain a knowledge of their cultural inheritance that ranges from the fragmentary to the relatively intact. Mexico is currently one of the Latin American states whose unity is likely be subject to increasing strain if the development potential of the rural areas of the country continues to be seriously neglected.

Our project partners are non-governmental organizations working participatorily with Indian communities to identify problems and examine ways of developing realistic projects to resolve these. They take responsibility for the requisite education and training programmes in the project activities that are planned.

Indian peoples involved in projects

Jalisco State:	Huicholes	19,393
Puebla/Guerrero State:	Nahuat	1,197,328
Chiapas State:	Tzeltales	261,084
Chihuaha State:	Raramuris	50,691
Campeche/Quintana Roo State:	Mayas	731,522

The figures show the total populations of the Indian peoples in question.

The poverty, low level of education and degree of knowledge of Indian cultures mentioned above mean that the Mexican Adult Education Project has had to base its work on the close connections between development and education policy, and to take into account the cultural contexts of the Indian communities. The Project can only be successfully implemented if education and training lead to the abandonment of the paternalistic institutions which preserve a particular view of the world in the conditions of poverty that obtain. In their place, the Adult Education Project sets out to foster the creative potential of those involved and to take seriously the existing knowledge potential of the Indian peoples.

The policy which the Mexican Government had previously adopted towards the Indian peoples was based on the view that they were a social burden and of little economic significance, rather than on the priority task of promoting the agricultural development potential of the rural areas of Mexico. It is therefore not surprising that the Indian population, inspired by the Chiapas conflict of 1994, started to become more aware once again of its cultural roots and to make political demands on the Government. This does not mean, however, that they regard their culture as a static system of values and exclusively traditional economic activities; rather, they are looking for greater room for manoeuvre in order to embrace conscious change and achieve decent economic prospects.

Given the historically enshrined paternalistic institutions – which systematically rule out self-awareness and action skills – the educational aim of the Project was initially to liberate the blocked human potential for creativity, and to trust to people's own judgment and ability to deal consciously with problems. The intention was to strengthen feelings of individual and collective responsibility, within the cultural context. The economic aspect was not overlooked, participatory "diagnoses" being carried out in parallel to record the available resources that might be developed into feasible economic projects.

Hence, the first stage of Project activities in the villages fluctuated as participatory responsibility came to determine progress in place of the paternalistic custom of making gifts in exchange for political services (e.g. electoral votes).

It was evident at the start of the Project that the non-governmental organizations involved had an idealized and standardized conception of Indian culture and were adopting strategies towards their target groups that sought to avoid conflict. Although these strategies might be perceived as the antithesis of Government programmes, they restricted the creative potential and increased responsibility of the Indian communities in question. The exaggerated and idealistic use of the terms identity, autonomy, culture and tradition in education and training programmes did not lead to sufficient exploitation of the potential for creativity and responsibility, and Indian knowledge was either sidelined or idealized.

If the Project was to be successful, practical skills were required in the individual project areas, together with educational provision that set complex intercultural learning processes in train. Space had to be found for cooperation in the planning and implementation of projects, drawing on different forms of communication and action, and a vari-

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Pruning fruit trees to improve quality *Photo: Ursula Klesing-Rempel*

ety of types of knowledge, learning and abilities. By means of a reflective approach to Project activities, the skill of intercultural learning between *mestizos* and indigenous people was intended to foster intercultural dialogue and democratization in the interest of a multicultural society. The intercultural dimension of the Project was thus a key feature of the education and training.

The practical activities in the villages could therefore no longer take the form of one-sided transmission of knowledge. Instead, elements of Indian knowledge needed to be uncovered and new skills learnt in order to break through the existing poverty and to work towards sensible, sustainable development.

From 1996, the first interdisciplinary seminars and colloquia were held on interculturalism and the intercultural education of children, attended by Indians from the Project and other organizations, coordinators and researchers. In addition to current problems of intercultural communication in Project activities, and discussions on the exaggerated concepts mentioned above, the main concern was what educa-

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tion and training should look like in future in a multicultural society. The current political debate about the notion of autonomy, in which Indian rights and general civil rights are not mutually exclusive, was one of the major intercultural points raised. The seminars were held at national and Latin American levels with financial assistance from the Volkswagen Foundation, which made it possible to promote awareness of the Indian issue and intercultural reconciliation beyond the borders of Mexico.

It was found that Indian women were hugely under-represented in both Project activities in the Indian villages and in the seminars. In some Project activities, the women listened in, but the high rate of monolingualism made it more difficult for them to participate generally.

Education for women in the villages became one of the key focuses of support in the Project. It is still difficult to encourage the women to move from silence to active participation in the Project and in village decision-making, even though this process is not to be seen as undermining Indian traditions and culture but as fostering individual and collective education in order to enrich that culture, contribute to village development and help the women to acquire their own sources of income. The involvement of the women in activities outside their villages, which is becoming a more frequent occurrence, assists various forms of learning such as greater knowledge of issues specific to women, increased personal security and ability to communicate, including the concomitant acquisition of a knowledge of Spanish.

The Projects

The agricultural projects focus essentially on improving the subsistence farming in which men and women work together. The growing of maize and beans as staple foodstuffs is improved by the use of organic fertilizer and mixed cultivation. The gardens around family houses are restructured to make more effective use of the land available and of animal husbandry. The plentiful rainfall during the rainy season can be stored for the dry season by the building of family or village water cisterns.

Larger social and economic entities are gradually being built up so as to develop local institutions. These produce coffee, honey and other goods for the national and other major markets. The Indian farmers, who form organized groups, have adopted the Tequio principle (collective behaviour providing mutual support in the family and village setting) at every step of learning how to change from artificial fertilizer to organic cultivation, and how to set up functioning cooperatives. The capital generated by members' small contributions, sales of produce and effective management means that economic projects are recognised as credit-worthy by State institutions.

In the innovative school centres opened by non-governmental organizations, which have gained official recognition over the years from the Ministries of Education in the relevant States, Indian young people are given general education and agricultural training so that they can become the promoters and agricultural technicians of future regional development. They are enabled to argue the case for their own programmes and equal funding with representatives of State agencies so that they can influence the terms and conditions of State programmes.

From their varied experience of projects, the Indian women have learnt to regard the undernourishment of their children as a social problem that can be overcome step by step, and they work as preventative and advisory health-care assistants in their villages. Through their work they define their situation as women in the context of their individual Indian cultures, and look for ways to reduce violence within the family, which is widely perceived as an unalterable natural state of things. Gender projects are increasingly aimed at men as a new target group, the purpose being to achieve a change in gender relationships that is constantly symmetrical.

Intercultural dialogue has become an increasingly important principle of the project, in a move away from the traditional "megaphone" approach. A professional understanding of development and education has grown up, supporting change that is jointly defined, aims at further developing the potential of the Indian population and regards human education as a key element of sustainable development.

An intercultural education consortium has been established, in which CREFAL *(Centro de Cooperación Regional para la Educación de Adultos en América Latina y el Caribe)*, CEAAL *(Consejo de Educación de Adultos de América Latina)*, AYUDA en ACCION (Spanish non-governmental organization) and the IIZ/DVV work together. Seminars are planned and funded with the aim of providing adult teachers with methodological guidance on intercultural learning. Teaching texts on interculturalism are to be prepared.

I should like to take this opportunity to thank all the Indian participants working on the projects who have learnt to overcome their fear of the joy of learning, to take responsibility for their own interests and to address the problems and conflicts associated with them, and who have shared their knowledge with us through intercultural dialogue in courses and seminars. In particular I should like to thank the women who have discovered the meaning of their own places of learning and have often had to defend these under difficult circumstances. A special word of thanks must go to those Indians who have agreed, after a lengthy process of learning and despite doubts and despair over living conditions, to take on the difficult and complex task of coordinating projects or heading schools and are increasingly developing their own project strategies.

I am grateful to the non-governmental organizations – *Ajagi, Alcadeco, Altepetl, Pro-Educación, Educe, Cesder, Imdec* and *Comaletzin* – for their commitment to the Project and thus to the democratization of their society, in difficult political and economic circumstances. I thereby thank all those Indians and non-Indians who have allowed me to learn and experience so much to date in remote villages in the various regions.

This brief article cannot capture the complexity of the Project activities, which obviously include planning and evaluation of quantitative results. It is more important to stress the significant and promising qualitative outcomes of the Project, which may have a considerable impact on future projects with Indian cultures.

It is also important to note that almost every area of the Project is adversely affected by conflict, either within villages, with external power structures, or as a result of questions of prestige. These conflicts can cause appreciable disruption and delays in the conduct of projects. Increasing climatic variation has changed the rhythm of the rainy and dry seasons, and is also one of the factors influencing the Project.

Concluding Remarks

Against the background of the increasing universalization of development models and a monoculture which, by means of standardized language and images, penetrate every locality through the media and computer technology, global cooperation can only succeed if development and education become one inseparable concept in international cooperation.

Education for children, young people and adults will become meaningful lifelong learning if it meets the changing demands of social, economic and political developments. It needs to include media skills for rural Indian communities. It should not be reduced to satisfying this demand however, but should create the conditions for critical appraisal of the media. The cultural diversity and heterogeneity of the world, with its regional wealth of biodiversity and cultural contexts, must acknowledge and support people's own varied development efforts and strategies. Awareness, dissemination and use of the knowledge of non-European cultures can make a significant contribution to the humanization of global institutions.

BASIC EDUCATION AND LITERACY

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Kenya Post-Literacy Project
Learning and Earning: Literacy for Sustainable Livelihood

Post Literacy Project Kenya: Pottery Project *Photo: Ekundayo J.D. Thompson*

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German development cooperation has been promoting basic education in developing countries since the early seventies, the multilateral development banks even started a few years earlier. Quite a few early approaches went wrong, but the experience gained over so many decades has given people a pretty good idea of what works and what doesn't. Herbert Bergmann of the GTZ (Deutsche Gesellschaft für Technische Zusammenarbeit – German Technical Cooperation) reviews the lessons learned, including those of other organisations. One of the major recognitions is that individual projects are ineffective and that there are no single-factor solutions: The system must be tackled as a whole. And that must always happen in a participatory way, together with local partners and parents. Dr. Herbert Bergmann is Senior Planner for the Basic Education sector in the GTZ Education and Health Division. He has worked in the basic education sector since 1974. herbert.bergmann@gtz.de. The article is reprinted from the journal "Entwicklung und Zusammenarbeit" Vol. 43. 2002:8/9, pp. 240–243

Herbert Bergmann

What Works and What Doesn't

Successful Approaches in Promoting Basic Education

Education has been promoted since the beginning of development cooperation. The initial emphases were on promoting higher education and vocational training. Basic education was included as a fringe activity. For many years teachers were seconded from the former colonial powers to support the secondary level.

German development cooperation began promoting basic education in the early 1970s, with the emphasis on technical cooperation (TC). Basic education development support funded from financial cooperation (FC) programmes began in 1984. While these initially focused on building and equipping schools, the range of FC measures has since widened significantly and now includes the promotion of basic and advanced teacher education and training, decentralisation processes based on popular participation and the improvement of planning instruments such as geographical information systems. In the late 1970s, the GTZ set up a Basic Education Unit in its Education Division. So German development cooperation itself can now look back on about 30 years' experience in the basic education sector.

The multilateral development banks began their work in this sector around the same time, the World Bank granting its first development loan for basic education in 1965.[1] Since then, the banks, too, have amassed a great store of experience.

This article aims to review the most relevant negative and positive experiences to explore what we can learn from them for future development cooperation in education. It mainly focuses on the experiences of the GTZ and the German Development Bank (KfW), but also includes those of the multilateral banks. For specific sources, it particularly refers to the series evaluation of basic education projects[2] of the German Federal Ministry for Economic Cooperation and Development (BMZ) and to the Oxfam Education Report.[3]

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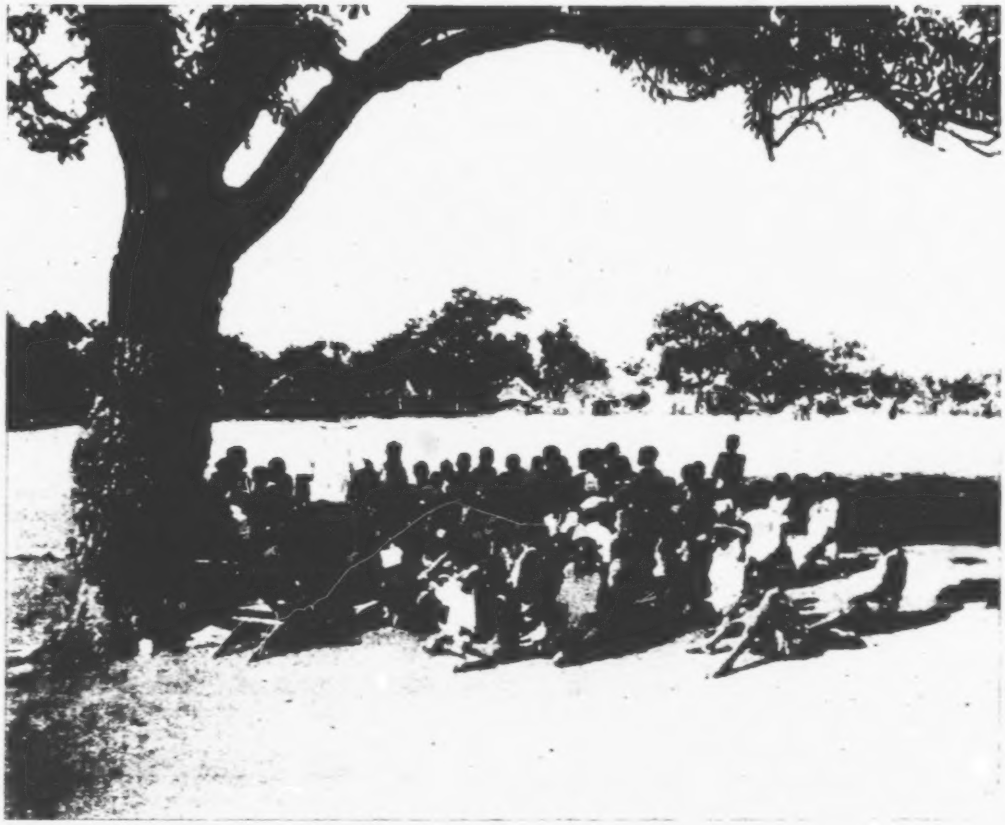
[1] E-mail information from the World Bank Education Advisory Service, 2002

[2] BMZ Series Evaluation "Erfolgsaussichten von Grundbildungsvorhaben" ("Prospects of Success in Basic Education Projects"), Bonn 2001

[3] Kevon Watkins: The OXFAM Education Report, Bath 2000



The shade of a tree does service as a school building in the Sudanese savannah
Photo: Goertz/missio/das Fotoarchiv

Approaches

Education is promoted through FC, TC and the secondment of personnel. Churches and NGOs are also active in the sector. Many projects and programmes are cooperative and deployed in combination, involving TC and FC and occasionally the seconding of experts via the Centrum für Internationale Migration und Entwicklung (CIM) and the German Development Service (DED). Future, still fledgling forms of promotion are the Sector Wide Approach (SWAp) and Sector Investment Programmes (SIP). The international trend is shifting from small, isolated projects with an 'island' and pilot character to a countrywide or at least regional SWAp that addresses the basic education sector's main problems in a combined approach.

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The Areas of Activities

Education is promoted at various levels and in different areas. The most important are:

- Political consultancy: support of policy and strategy development, consultancy in the implementation of national sector policy, support of decentralisation processes and maintenance.
- Promotion of institutions: building up or strengthening educational institutions in their capacity to develop curricula and teaching aids, examination systems, institutions for teacher education and training, educational research and planning, and improved management.
- Self-help: supporting active popular participation in the planning and implementation of education programmes and in running schools.
- Development of competence: education and training of teachers, of employees in sector institutions and school administration, as well as of technical staff.
- Quality of instruction: consultancy on the introduction of new learning and teaching methods, improvement of work-oriented basic education, science education and environmental education.
- Improvement of infrastructure: building and equipment programmes for schools, teacher training and education administration institutions.
- Target group-specific approaches: promotion of basic education for girls and women, basic education for refugees, alternative approaches for those disadvantaged due to their ethnicity, language, religion or race (for instance intercultural bilingual education).

What We Have Learnt

We have by now acquired a body of general experience in promoting education. Providing organisations and national partner organisations have learnt that:

1. Project 'islands' must be avoided. Small, locally limited approaches and even model experiments do not make much sense in themselves because education systems always apply nationwide. Only very seldom can locally limited improvements influence the overall system. Even if they may be considered successful in technical educational terms, they actually increase social inequality because they benefit only a few pupils. On the other hand, pilot projects and model experiments are often necessary to facilitate educational innovation. But they must contain a perspective of transferability for the benefit of the entire education system. A prominent example in the field of TC is the development of a complete basic education curriculum in the Qechua and Aymara languages in Peru since1976. The project was implemented in a pilot region in the Departamento (district) of Puno and then successively replicated in other regions with the same languages.

2. Good teaching alone is not enough. Projects limited to the technical/pedagogical level of teaching and ignoring sector institutions, budget issues, education policy and administration are seldom sustainable. Their targeted results are practically never generalised, and often they disappear at the same place where they were generated during the lifetime of the project. An example is the fate of agriculture education in Tanzania. Despite functioning approaches, it could not be sustainably incorporated into the education system.

3. There is no 'one-factor' solution. Success can be achieved only with systemic approaches, even where work is mainly focused on the technical educational level. Experience in Indonesia has shown that science education cannot be improved just by providing good science kits. The partner had insisted that the TC be limited to the development and distribution of such kits. Only when the partner realised that this would not raise learning performance, were advanced training for teachers and development of textbooks added to the package. Similar experiences were gained in Rwanda with improving the teaching of life skills. In the 1980s, the Rwandan partner insisted that only equipment was needed. When they noticed that it was not being used, they agreed to advanced teacher training as an additional component.

This goes with the nature of the learning process – in and out of school. Learning happens in a process organised by a teacher and uses various 'production factors': the knowledge and process skills of the teacher, the information provided by teaching aids and infrastructural conditions. They are interdependent – one can hardly replace the other. Teaching aids can be no substitute for the competence of a teacher, and the less so if the pupils' ability to learn autonomously is weak. A competent teacher can compensate for a lack of teaching aids and inadequate quality up to a certain point. However, if there are none at all, the teaching and learning process changes its character. It will run differently and mostly much less efficiently.

4. No one can get around going to school. Non-formal education is not an alternative to formal school education.[4] As a second chance, it can supplement formal schooling, for example for such target groups as teenagers and adults who have never been to school, dropouts and child workers, but even then it should have a clearly defined connection to the formal education system to enable transition and the opportunity to take recognised examinations.

The most spectacular failure in this regard was the 'ruralisation' of education in Burkina Faso in the early 1970s. Parents rejected a well thought-out curriculum concept because they considered this model of basic education a dead-end street. There was no link to the formal system, no transition and no equivalency of school-leaving qualifications. For the parents, the relevance of the learning content alone was insufficient.

Experience with major literacy programmes is also sobering. Reports from India say fewer than 10 of 94 expected literacy training centres were functioning.[5] Positive results were achieved in German development cooperation with functional adult education. These include literacy projects for industrial workers in Egypt, training of Afghan women refugees in family healthcare, training of rural women in Sen-

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[4] OXFAM, p. 100

[5] OXFAM, p. 307

Ethiopia *Photo: Ron Gilling/ Lineair*

egal linked to income-generating measures as well as training for elected rural community representatives to introduce them to their new function and tasks.

5. You learn only what you understand. This is meant in a very basic sense. In many developing countries, especially in the former colonies of European powers, school learning begins in a foreign tongue from a completely alien language region. The most important insights about this can be summarised in four points. First, experts agree that teaching children to read and write should start in a language they understand, either their mother tongue or a regional lingua franca. This has also been proved by a TC project in Niger. At a later date, the country's official language may then also become the classroom language. However, in teaching terms, the transition to the of-

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ficial language is difficult to manage. Second, there is often political opposition to the introduction of local languages in classrooms, sometimes as a result of the policy of the former colonial power, sometimes due to the business interests of textbook publishers in Europe. France only a few years ago gave up such resistance in its former colonies. Third, there is also opposition within developing countries' societies which has to do with the prestige of their former colonial language, its value in seeking a job and fear of a loss of advantages. Fourth, without changing the language used to teach, basic education can be neither effective nor efficient. Language difficulties result in higher dropout and repeater rates that cannot be reduced.

German development cooperation has earned a sound reputation in this field. It was and is active in Latin America (Peru, Bolivia, Ecuador, Guatemala), in sub-Saharan Africa (Ghana, Madagascar, Mali, Mozambique, Namibia, Niger, Senegal and Chad) and in Asia (Pakistan, Sri Lanka). In this field, it is a world leader.

6. The best basic education is a good general education. Time and again, attempts have been made to enhance the relevance of basic education by adding elements of vocational training. UNESCO propagated the ruralisation of basic education in the 1960s and 1970s, but it was rejected, as the example of Burkina Faso shows. German development cooperation has promoted such approaches in Cameroon, Kenya, Peru und Rwanda, partly with considerable funds. It is currently promoting such a project in China, with prospects of sustainable success. The experiences in this field can be summarised as follows. First, the practical components added to the general subjects overtax primary school teachers. Second, well-qualified secondary school teachers are 'poached' (Peru). Third, the budget can finance neither investment nor running costs. Other sources of income are unreliable. Fourth, at the examination stage these added practical subjects count for less than general education subjects and, in cases of doubt, they are ignored.

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7. Relevance to real life is possible. In Rwanda, the subject 'Vocational Training and Technology' was set up, which, if need be, could be taught without tools, working materials and workshops, but still prepare young people for work. The approach of incorporating vocational training and technical instruction into the general curriculum in China has a chance because, and so long as, it corresponds to the prevailing ideology. Healthcare and environmental education, integrated in subjects such as general knowledge and science education, will increase the relevance of these subjects. Many projects in Africa address the issue of HIV/AIDS in basic education.

8. Teaching basic science is a way to the future. Many politicians acknowledge the significance of basic science for economic development. Such teaching has far-reaching cultural implications if it casts doubt on handed-down knowledge of the world and things as they are and instils a systematic questioning attitude. Science education is particularly difficult to improve; there is often a lack of everything – qualified teachers, appropriate teaching aids and a concept of knowledge that shifts from facts learnt by rote to an understanding of their contexts. If one wishes to improve it, a systemic approach must be selected. Cooperative projects in which FC and TC are combined are particularly successful in this field. The current Science Education Quality Improvement Project (SEQIP) in Indonesia is a good example.

9. Simultaneous intervention at several levels and the combination of as many instruments as possible is the most effective approach. Series evaluation has shown that sound work in the educational sector, promotion of institutions, development of competence and political consultancy as well as a combination of FC and TC have achieved the best results. The large-scale cooperative project in Pakistan's North-West Frontier Province illustrates this and international experience confirms it as well. The BMZ's strong emphasis on favourable framework conditions and political consultancy is without doubt well justified. But it must not result in neglecting the 'technical level'. The development banks in particular tend to lean in this direction, although they too are gradually beginning to change their approach.[6]

10. Only participation at all levels creates identification with projects and responsibility. The effectiveness of projects and programmes can be improved by embedding them in coherent national development and sector strategies that are supported and implemented jointly by the partner country and the donor community. The future development of basic education should be driven forward by sector strategies that are developed by the respective country and conform to its priorities.

Nothing is more difficult than developing strategy. Experts usually dominate it. In Yemen, a highly participatory process was got underway, advised and backed up with TC. Participation by education authority officials and representatives of civil society is – still – unusual. Yemen is no exception. The innovative approach not only achieves highly interesting results, which are now being reworked and supplemented by proven experts, it also generates a high level of identification, including among the decision-makers in the education ministry and in civil society.

Conclusions

In what ways can these experiences be used? It is clear that the days of small or large individual projects are ending. Programme building is underway, and German development cooperation expects eight programmes to be running next year in basic education alone. Many of them are joint TC/FC projects. The integration of bilateral development cooperation in countrywide sector development programmes together with other donors is the future trend. Theories and proposals for processes and instruments are being worked on.

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[6] OXFAM, p. 248

Burkina Faso *Photo: Ron Gilling/ Lineair*

Pilot approaches, which have often formed the focus of projects, should be set up only for demonstration purposes. They are, however, essential for this. Approaches that have been successful elsewhere must also prove their usefulness under different conditions.

Large-scale bilateral and multilateral sector programmes frequently involve the combination of all instruments of FC, TC and the secondment of personnel.

The discussions in the context of the G8 process have emphasised the significance of long-term, reliable promotion. The World Bank's decisions and its 'fast-track countries' initiative (speedy promotion of scrutinised 10-year development plans) are heading in this direction. The countries need dependable financing pledges for that. The loom-

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ing change from very short-term development loans (the multilateral banks' standard term is three to four years) is recognition of reality. Political consultancy and development of organisations take longer, among other things because people must change their attitudes in a long-term and enduring manner. Experience with SWAps indicates planning phases of five to seven years. Such run-up times must be shortened.

The outline and detailed planning of comprehensive education development programmes must take account of the experiences gained. There is an urgent need for 'knowledge management' here. Existing knowledge is neither systematically processed nor easily accessible. The OXFAM Report has made a beginning and demonstrably is based on very extensive sources. But that is not enough. The local variants of the main experiences must be made available to decision-makers and planners by using all the potential of the new media.

Most of the international innovations in basic education have already been incorporated in German development cooperation projects in one form or another. A consultancy offer will be developed in the near future to promote greater use of new information and communications technology (ICT) as a strategic innovation in the education sector.

We see a future need for consultancy in the following areas: management of the education sector, financial planning of education systems, pre-school education, teaching in multigrade schools (where one teacher takes several different classes), and trans-sectoral fields such as education and human rights, and education and promotion of democracy.

Finally, more than two years after the World Education Forum in Dakar, promotion of education received the necessary strong response among multilateral organisations and bilateral donors. A salutary unease over the poor educational situation in many developing countries may now turn into a new support concept and more money for education. Germany has committed itself to this goal within the G8 group, with a special focus on basic education. Dr Michael Hofmann and Dr Stefan Lock, of the development ministry (BMZ), portray in this article a new way for international cooperation in promoting education. Dr Michael Hofmann is head of BMZ Department 4: Global and Sectoral Tasks, European and Multilateral Development Cooperation. Dr Stefan Lock is programme officer for education in BMZ Section 415: Education, Health, Population Policy. The article is reprinted from the journal "Entwicklung und Zusammenarbeit" Vol. 43. 2002:8/9, pp. 244–245.

Michael Hofmann/Stefan Lock

From Dakar to Pisa: Growing Support for Basic Education

International Donors React to Continuing Crisis

Education enables people to improve their social, cultural and economic situation – and strengthens sustainable development:

- Knowledge is the prerequisite for self-determination and self-realisation. Being able to read and write facilitates the realization of individual rights and social participation.
- Well-trained skilled workers increase productivity and improve the quality of work.

- Health education improves hygiene and nutrition and thus also contributes to an increase in life quality and expectancy.
- Environmental knowledge is the basis for a more sustainable use of natural resources.

These few examples show that education is a prerequisite for successful poverty reduction. Where basic education cannot be sufficiently provided, development programmes in all sectors quickly come up against their limits. The correlation between illiteracy and mass poverty in large parts of Africa is as obvious as is the positive relationship of development successes and long-term investment in education – especially in basic education - in Asia.

It should long have become common knowledge in all countries that investment in education is highly profitable in the long run – and that the promotion of women and girls in particular pays off in every respect:

- Mothers with a school education have healthier families than female illiterates. Children's school enrolment and learning achievements are better ensured if their mothers themselves have enjoyed schooling.
- Aids prevention programme with their implications for attitudes and behaviour work better with a linkage to health education for women.
- Modernisation of farming in many countries where women do most of the work in the fields makes headway only by educating women.
- General education for girls raises the average age at marriage and in the medium- to long-term slows population growth.

All evidence supports school access for girls and boys on an equal basis. UNICEF in particular has done great work in promoting enrolment of girls in schools. However, girls still account for a much lower proportion of enrolments than do boys – not only in Islamic countries – and often they leave school earlier than their male classmates.

Therefore promotion of basic education must pay particular attention to the situation of girls.

Basic Education is the Core Foundation

Education experts agree that the development of higher competences requires at least five to six years of learning the basic cultural techniques of reading, writing and arithmetic. In too many developing countries, however, the public formal school system cannot guarantee command of these techniques, much less an appropriate secondary education. That is why private sector educational institutions have become more important in some developing countries, including non-formal literacy programmes for young people and adults. This is often a necessary and commendable functional equivalent to public school systems, but in social terms it is not without cause for concern.

The scarcer and more expensive access to education is, the greater the risk that socially disadvantaged groups will be excluded from it. Exclusion of entire sections of a population from basic education is already a reality in many countries, a situation which is unacceptable in the light of the global development goals for 2015. Promotion of education should therefore give priority to capacity building for education planning and service delivery by national governments in order to achieve a minimum of social justice.

After all, the 164 countries represented at the World Education Forum in Dakar in April 2000 committed themselves to realising 'Education for All' by 2015. The Dakar commitments – particularly comprehensive basic education, elimination of gender-specific inequalities in the primary and secondary educational sector, and equal educational opportunities for boys and girls – were adopted in the United Nations Millennium Declaration. Thus they are core tasks of international poverty reduction, to which German development cooperation has also made a special commitment (Action Programme 2015). The developing countries are certainly called upon here, but so, too, are the donor countries and institutions which in Dakar pledged that "no country seriously committed to basic education will be thwarted in the achievement of this goal by lack of resources".

Alarming Figures Spur Education Initiatives

Although in a great number of countries notable successes in school enrolment and improving the quality of primary school education have been achieved, the global education situation is still appalling. Almost one billion people are illiterate. About 130 million of them are children with no access to a formal education system, which means every fifth child of school age. Another 150 million children have more or less no opportunities in life because they dropped out of primary school. Girls are affected disproportionately; their socio-cultural disadvantage begins at home and often continues at school due to poorly trained teachers, molestation and sexual coercion, or inadequate sanitation facilities.

In many places, progress in school enrolment has been nullified by population growth. Therefore in the wake of the Dakar conference Oxfam and other NGOs, as well as UNESCO and other international organisations, rightly demanded greater efforts on education – and finally got a hearing after the World Bank also pointed out alarming trends in World Bank studies showing that almost 90 countries are 'off track', meaning they are distancing themselves from the course set in Dakar because they are unable or unwilling to offer children a comprehensive basic education of high quality. In one-third of these countries armed conflicts have disrupted the school system to such an extent that entire generations of pupils are being denied basic education. Therefore ceasefires and peace are also indispensable prerequisites for education. Where favourable general conditions are lacking, the education systems fail, too. Thus a priority development task is to create such conditions - good governance and transparent administrative structures – to be able to guarantee sustainable success in the education sector.

Because progress in basic education is too slow or too isolated to achieve a general change in trend, the World Bank has for the first time set generally recognised benchmarks which are oriented on the good examples of successful developing countries. In an action plan that builds on them, the World Bank has identified 18 countries which have promising and realistic educational planning in place and given external support can be brought on to the Dakar course relatively quickly by means of a so-called ‘fast-tracking’ initiative.

The German Minister for Economic Cooperation and Development Heidemarie Wieczorek-Zeul has pledged support for this action plan, which was underpinned expressly by the G8 decisions in Kananaskis last June, particularly since promotion of education plays an important role in the African NEPAD initiative.

At the European Union level, a Council of Europe decision has already committed the European Commission and the EU Member States to greater funding of general education and vocational training in the context of global poverty reduction. Basic education is to be given special promotion as a priority both bilaterally and by the Commission.

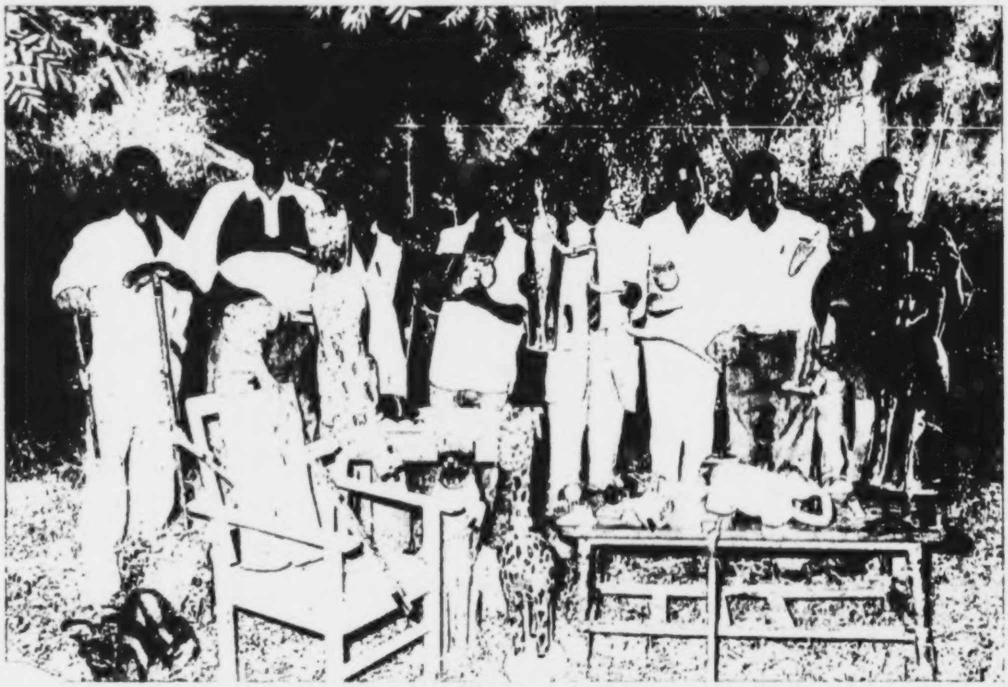
The German Input

The benefit of political support for the action plan meant that all involved were able to agree on what should take place at the autumn meeting of the World Bank. German development cooperation aims to and can well take an active part in implementation:

- The GTZ and KfW have broad experience in promoting basic education and increasingly combine complementary Technical and Financial Cooperation, whose success has been confirmed by a recent sector evaluation report. Both implementing organisations promote as a priority state educational institutions, but also private sector organisations, which in addition receive support through consultancies and investment in education infrastructure by the German Development Service (DED) and German NGOs.

- German development cooperation has also proved by many projects – in West Africa, Yemen and Guatemala, as well as under especially difficult conditions in Pakistan with its millions of Afghan refugees – that gender-specific measures in particular contribute to general educational success.
- Last but not least, German development cooperation brings to bear its weight as one of the biggest donors in the education sector, especially since German spending on basic education programmes will double in the next five years.

Germany will also have to continue to speak up in the decision-making bodies of the development banks and the European Union for greater promotion of basic education – and intensify cooperation with like-minded countries. UNESCO and the World Bank are called upon in their monitoring of progress and results to examine critically whether the newly founded partnership between the industrialised and developing countries will be able to achieve the ambitious goals for basic education by 2015.



Home Bay Adult Literacy Craft Project, Kenya *Photo: Danson Mbaria, PLP*

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In recent years, attention has increasingly been focused on the instrumental objective of literacy in the context of its perceived relationship to livelihood. The oft repeated question "literacy for what?" is as valid today as it was several decades ago. This question has in the past generated a spirited debate on the relationship between literacy and development. Not only have critics rejected arguments which tended to view literacy as a precondition for development but they have questioned its functionality in the absence of empirical evidence of its uses and practices. The notion of education for all, and the strategies proposed for achieving it, including the diversification of educational delivery systems, are calling attention to literacy and its role in enhancing the well-being of those who strive to acquire it. Consequently, the purpose and nature of literacy, and the methods of its acquisition are now important issues on the Education for All Agenda. The following article seeks to shed light on the linkage between livelihood and literacy and on how this linkage might be used as a strategy for increasing learners' motivation and participation in individual and community development processes. J. D. Thompson is Advisor to the Kenya Post-Literacy Project.

Ekundayo J.D. Thompson

Putting Bread on the Table
The Effects of Literacy and Livelihood

Programmes on Female Learners' Participation in Literacy. Case Studies of Four Women's Income-Earning Groups in Kenya

Background

The Kenya Post-Literacy Project was designed on the bases of a number of strategic interventions including establishment of functional links between the Adult Literacy Programme (ALP) and the Post-Literacy Project (PLP). The rationale for this strategy lay in the assumption that the PLP would be unsustainable without an effective ALP. As an integral part of the process of lifelong and continuing education, post-literacy depends, by and large, on a solid foundation of basic literacy. The two methodological approaches which constitute the theoretical framework of the PLP, namely **the course-bound curriculum approach**, and **the open curriculum approach**, took into account the functional needs of the target groups – the newly literate adults and out-of-school youth.

Functional Needs of Newly Literate Adults

The learning needs of newly literate adults include knowledge and skills aquisition, attitudes formation, and internalization of living values. The operational contexts and circumstances of the learners determine to a large extent how these needs might be met. Social, economic and cultural contexts therefore, are important factors in the design and implementation of adult education programmes and projects. In the case of the Post-Literacy Project, the beneficiaries had expressed a number of felt needs during a baseline study in which they had participated in the twelve (now fifteen) operational districts. The needs expressed included:

- development of paid employment and self-employment opportunities
- relevant reading materials to support people in their development efforts... in agriculture, health, environment, trade and other fields[1]

Two activities were initially undertaken to address the needs identified above. The first was the development, production and distribution of relevant reading materials,[2] and the second, training of adult education teachers through the Participatory Integrated Development (PID) process,[3] in collaboration with the GTZ-assisted Kilifi District Development Programme (KDDP).

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[1] Ngau, Margaret. 1997. Situational Analysis of Adult Literacy in Kenya. Final Synthesis Report. Department of Adult Education (DAE) and German Technical Cooperation (GTZ).

[2] The list of materials which have been produced and distributed include: Jinsi ya Kutumia Mikopo ya Kilimo; Kuanzisha na Kuendeleza Biashara Ndogo Ndogo; Start and Manage Your Own Business; How to Start Your Own Business.

Learning and Earning: A Conceptual Framework

Participatory Integrated Development is an approach to meeting the diverse, and often complex, social, economic and cultural needs at both the individual and community levels. Meeting these needs in an integrated and holistic manner recognizes their organic relationship.

From Basic Needs to Basic Rights

The concept of learning and earning can be operationalized through an integrated approach to meeting the basic needs of the learners although current thinking on education and development is shifting from the concept of basic needs to basic rights. This shift is necessitated by the fact that learners have a right to education and other basic needs. This right implies the exercise of duties and obligations not only by the right-holders but also by those whose duty it is to create opportunities to facilitate exercise of the rights.

Over the years, there has been an apparent paradigm change in the theoretical frameworks of education and development. The traditional neo-classical economic assumptions about education and development were founded on the *Human Capital Theory* of Schultz (1961), which gave rise to the *Basic Human Needs Approach* (Sandbook, 1982). According to this approach development efforts should be focused on food production, rural development, population planning and health, provision of shelter and education to satisfy basic human needs. The lack of basic human needs was attributed to inefficiency in the production and use of resources. Consideration was given neither to the issue of inequality in the distribution of resources nor to the critical issue of control of the means of production in the hands of a few. Both the Basic Human Needs approach and the Basic Human Rights approach or "rights-based development" approach are predicated on the view that human rights and human needs are multidimensional and indivisible. Consequently, for the objectives of sustainable human development to be achieved, respect for human rights and fulfilment of basic human needs are imperative.

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[3] Eighty-four teachers have been trained in the Participatory Integrated Development (PID) approach.

Process Implications of the Basic Rights Framework

Adult education and literacy programmes are increasingly emphasizing *process orientation,* which recognizes the centrality of the role of the learners/beneficiaries/participants in the learning and development processes. Towards this end, strategies and methodologies which seek to **empower** people are in vogue; these include the variant of participatory methodology, which characterizes current social development interventions.

Literacy programmes are being designed to enable women to develop their self-esteem by integrating the skills of literacy, numeracy, oral expression and problem-solving with the activities in which the women are involved. The starting point for learning is the utilization of the resources and assets of the learners in recognition of their prior learning and experience.

Introduction to the Investigation

Meeting the learning needs of women without access to educational opportunities, and facilitating their participation in income-earning programmes is an objective which many providers strive to attain in fulfilment of the objective of education as a universal human right of all. For women, this right is perceived as the key which unlocks doors to innumerable opportunities and choices both for their own well-being and that of their children.

The recommendations, resolutions and declarations of many conferences, and international conventions, covenants and treaties have called for the education of women and the provision of educational opportunities that are culturally appropriate and gender sensitive. The education of women tends to enhance their self-reliant capacities, contributes to increasing their productivity, ensures their autonomy and informed decision-making powers. The net effect is an increase in the level of motivation for continuing learning and education. *The Hamburg Declaration and Agenda for the Future,*[4] for example, recommended the investment of an equitable share of resources in women's education "to ensure their full participation in all fields of learning and knowledge." This is to be done in a variety of ways including linking adult education with job creation, and the goals of social development. Towards this end, all possibilities and alternative strategies are being considered including venturing into non-traditional areas of work. This might, in the long run, contribute to removing stereotypes in terms of the dichotomy between men's work and women's work. A variety of competences including scientific and technological literacy[5] would need to be acquired, and the socio-economic and political environments in which work is done would require a critical analysis and transformation given their effects on the processes of learning and earning a living.

The linkage between literacy and livelihood or livelihood and literacy is justified in terms of the need to integrate education and work, create opportunities to apply the skills of literacy and numeracy, contribute to the process of poverty alleviation, link literacy and post-literacy and make learning a meaningful and worthwhile experience.

Justifying Literacy and Livelihood

The level of participation of adult learners in literacy has been declining over the years. A combination of social, economic, cultural and psychological factors have accounted for the apparent low level of motivation which has negatively affected participation. According to the *1999 Population and Housing Census*, 4.2 million people in Kenya have never been to school. It is estimated that some 3 million children of school-going age and young adults are out of school. A variety of reasons account for the large out-of-school and illiterate adult population.

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[4] UNESCO. 1997. The Hamburg Declaration The Agenda for the Future. p. 43

[5] See also, Manjula P. Rao. "Scientific Literacy – Its Impact on Neo-Literates". In: Indian Journal of Adult Education. January – March 1998.

Table 1: Enrolment of Adult Learners between 1979 and 1995

Year	Male	Female	Total
1979	93,866	321,208	415,074
1980	89,053	309,824	398,877
1981	76,351	295,651	372,002
1982	74,481	273,319	347,800
1983	74,276	269,612	343,888
1984	57,188	205,244	262,432
1985	38,497	132,550	171,047
1986	51,367	174,865	226,232
1987	38,602	105,880	144,482
1988	52,744	105,490	158,234
1989	33,543	100,383	133,926
1990	37,092	110,847	147,939
1991	30,123	98,016	128,139
1992	28,504	82,579	111,083
1993	27,829	90,026	117,855
1994	26,594	87,684	114,278
1995	26,168	82,739	108,907
1996	26,612	89,029	115,641
1997	28.139	73,215	101,354
1998	26.180	74,081	100,261
1999	30,200	71,061	101,261
2000	25,802	68,101	93,903
2001	26,479	66,573	93,052
	1,019,690 (24%)	3,287,977 (76%)	4,307,667

Source: Department of Adult Education, Ministry of Labour and Human Resource Development. 2000 Annual Report
Republic of Kenya, Central Bureau of Statistics Ministry of Finance and Planning. Economic Survey 2001. Economic Survey 2002.

The previous statistics by the Department of Adult Education (DAE) indicate a fluctuating enrolment situation between 1979, when the national adult literacy programme commenced, and 2001.

In twenty-three years a total of 4,307,667 adult learners (76 per cent women) participated in the programme, with the declining enrolment trend continuing. The reasons for the decline in learner enrolment, according to the DAE (ibid.) include low teacher motivation due to poor remuneration resulting in irregularity in class attendance, lack of teaching and learning materials, lack of income-generating activities and inadequate training of part-time teachers. It has been observed that classes and centres with income-generating activities are likely to retain both the levels of learners' motivation, and their participation. According to DAE

> *to make the teaching of the 3Rs meaningful, deliberate efforts were made to integrate income-generating projects into the literacy programme.... These [projects] helped learners get some income and improve their living standards. It was [observed] that centres with income-generating projects registered more learners due to high motivation as skills learnt were put into practical use and the income generated helped learners to solve some of their domestic problems (ibid. p.7).*

Rogers (1993:11) explained that the DAE programme declined in enrolment since 1979 for many reasons, partly financial but mainly from a decrease in learner motivation.

Objective and Processes of the Case Studies

The objective of the case studies was to examine the effects of literacy and livelihood programmes on the participation of female learners in adult literacy in selected literacy and income-earning projects and activities in Embu, Homa Bay, Machakos and Nairobi. Data were obtained through Focus Group Discussions, and administration of a questionnaire.

The concept of "learning and earning" has been extensively discussed by the providers and beneficiaries of literacy at various levels of operation. A number of grassroots women's seminars were organized by the Department of Adult Education, under the aegis of the

PLP, to enable women who were involved in literacy and income-generating activities to discuss the relationship between *learning and earning* and suggest modes of operationalizing it. The discussions were organized in focus groups with female resource persons as facilitators of the discussions which were in the (mother-tongue) languages of the people in ten out of the twelve operational districts.

As the grassroots seminars were taking place, discussions on *Poverty Alleviation and Gender* were being held by a voluntary working group which was concerned with self-evaluation of the impact of GTZ-assisted projects. They discussed critical issues related to project impact. The discussions were part of national and global initiatives that had been embarked on to map out a strategy for poverty alleviation through micro and small enterprise development in developing countries. The International Symposium on *Microfinancing and Promotion of Micro and Small Enterprises* organized in June 2000 in Praia, Republic of Cape Verde, is an example of action at the global level.

Maguje Home Bay Adult Learner Agroforestry and Water Project, Kenya
Photo: Danson Mbaria, PLP

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In the context of the PLP, a number of fact-finding visits to organizations involved in literacy and income-generation were made and consultative meetings held to map out collaborative strategies for providing opportunities for learning and earning. The visits yielded valuable information on who was doing what. The consultative meetings with the Kenya Rural Enterprise Programme (K-Rep) Financial Services Association (FSA), for example, were useful in terms of providing both a conceptual and an operational framework for learning and earning.

The Conference on Education for All (Jomtien, March 1990) called for an 'expanded vision' of basic education that surpasses present resource levels, institutional structures, curricula and conventional delivery systems....Towards this end, calls have been made for **innovative methods** of delivering adult literacy and education. Calls for a change in conventional didactic methodology to empowering life-skills oriented methodologies are timely in view of the very serious challenges which economic systems in Africa pose. Poverty levels have increased and the majority of the populations are subsisting below the poverty line. Consequently, illiteracy, which has been correlated with poverty, cannot be eradicated through programmes which seek to deliver literacy for its own sake. Current thinking suggests that meaningful literacy fulfils a number of mutually inclusive economic and social objectives.[6]

There appears to be a consensus on the proposition that "achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults", one of the six EFA goals, will be severely constrained by old-fashioned, top-down and teacher-centred approaches.

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[6] The rationale for Learning and Earning in the context of the Kenya Post-Literacy Project includes the following: integration of education and work, creation of opportunities to apply the skills of literacy and numeracy, poverty alleviation, building of self-reliant capacities.

Definition/Explanation of Key Concepts

Adult Literacy:

The ability of adults (persons who are 15 years +) to identify, understand and use information from a variety of written sources for a variety of personal, social, economic and civic development purposes. Literacy in this study includes scientific literacy, which is defined as

> *"the basic understanding of Science and its application in society by everyone in order to make informed decisions in their daily lives to function effectively as citizens" (Rao 1998:10).*

Post-Literacy:

> *"An integrating learning process to assist literates to retain, improve and apply their basic knowledge, skills and attitudes for the satisfaction of their needs and to permit them to continue education through a self-directed process of improvement of quality of life" (UNESCO).*

Income-Generation Activities:

Small-scale for profit business activities undertaken by organized groups independently or as part of an adult literacy class.

Motivation:

Expression of the need to want to learn.

Participation:

Active involvement in social action to become literate, through empowering participatory approaches and methodologies.

Literacy and Livelihood in the Context of Poverty Alleviation

Economic empowerment of the participants in adult literacy and education programmes is an effective strategy for poverty reduction. Poverty, which has been defined as the inability to provide basic material goods and infrastruture, sufficient medical services and adequate educational facilities, is multidimensional. It is manifested in such phenomena as social exclusion, shortage of income, deprivation in knowledge (e.g. illiteracy), low life expectancy, poor quality of life and lack of material means.

The World Bank estimates that one in four persons worldwide lives in poverty and "is forced to subsist on less than one US dollar per day". It is reported that "the UN representatives have declared a war on this situation". Their objective is to help 50 per cent of the poor escape from poverty by 2015. The year 2015 now appears to be the miracle year when it is expected that the basic needs of all will be met. "Everything for all" by the year 2000 was the slogan several years ago but the year 2000 came and receded into history leaving people more destitute than they were when the seemingly unachievable objectives were being formulated.

Poverty alleviation in Kenya is a major objective of the Government. The 1996-1998 *Policy Framework Paper* stated that the government budgetary resources "are to be shifted to core functions which include provision of broad-based basic education among others". *The National Poverty Eradication Plan* (1999), which provided a national policy and institutional framework for urgent action against poverty in Kenya, recognized the right to literacy and numeracy. The *National Development Plan 2002 –2008* has as its theme "Effective Management for Sustainable Economic Growth and Poverty Reduction". In his 'Foreword' the President of Kenya expresses the hope that a better life for all Kenyans will be achieved.

Commitment to major improvements in supply of and accessibility to essential services such as basic education, health, water and sanitation for the poor is in line with the call of the President of Kenya for increased investment in education and health of the poor, who constitute about 50% (12.6m) of the population, in order to make them more productive and bring them into the mainstream of national development.[7]

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[7] President Moi in the Foreword to The National Poverty Eradication Plan, 1999. See also First Report on Poverty in Kenya Volume III: Welfare Indicators Atlas. CBS August 1998.

Overview of Literacy and Livelihood Interventions

Action at the Local and Global Level

Bible Translation and Literacy (BTL) undertook feasibility studies in four of its literacy language projects, namely Tharaka, Digo, Duruma and Pokomo Language Development Projects[8] in Kenya between January 8 and February 2, 1996. The objective was to assess the need for establishing functional links between literacy and livelihood in the language projects.

At the international level a study on strengthening livelihoods with literacy was undertaken by the Institute for International Cooperation of the German Adult Education Association (IIZ/DVV) on behalf of the Human Development Sector of the Africa Region of the World Bank.[9] The study, which relied mainly on documented information, and observations in some cases, adopted Rogers' (1997) theoretical framework which identified five types of literacy and livelihood programmes which, for the purpose of this study, can be described as "literacy comes second/livelihood comes first" "integrated literacy and livelihood" and "parallel literacy and livelihood" approaches. The observations of the study related to the nature of the programmes in terms of their diversity,the characteristics of the participants, i.e. poor, rural and predominantly women, and the effectiveness of the programmes in terms of their management capacities and the achievement of their objectives. The study observed that **"education and training programmes for very poor adults need to offer very clear, concrete and immediate reasons to justify enrolment and ensure perseverance"** (p.9).

In Kenya, one of the four countries included in the study, it was revealed that the literacy second approach was not widely practised.

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[8] Bible Translation and Literacy. Feasibility Study Reports of the Duruma, Pokomo and Tharaka Language Development Projects. Mimeo, (unpublished).

[9] John Oxenham et al. 2001. Strengthening Livelihoods with Literacy. Report of a study of programmes of adult education and training that have attempted to incorporate either training for livelihood skills into mainly literacy instruction, or literacy instruction into mainly training for livelihood skills.

However, the findings indicate that adult literacy programmes which included livelihood components and skills training tended to be more effective in terms of increased participation, higher attendance and retention, and completion rates.[10]

In 1993 Alan Rogers undertook a study of literacy in Kenya on behalf of the British Overseas Development Administration (ODA). The main objective of the study was to offer advice "as to where ODA assistance could be offered in order to increase the participation of women in adult literacy programmes." The study was focused on two major issues namely, the quality of the existing programmes and, "how to encourage more women to participate in more effective adult literacy programmes". One of the recommendations of the study was to encourage and assist women to participate more regularly in literacy programmes.[11] He observed that seventy-five per cent of those who enrolled in literacy classes were women but women were the minority of those who took the proficiency test and they appeared to perform (in the proficiency test) less well than men.

Findings of the Case Studies

Formation, Organization and Membership

All the groups, with the exception of Karungu, started as self-help groups with a literacy component in their activities. Karungu included a literacy component in their work in the year 2000, twenty years after the group was formed.

The investigation indicated that the uses of literacy were closely related to the effective performance of livelihood activities. The members of the groups stated that their effectiveness would have been constrained without literacy.

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[10] Anna Mwangi. "Strengthening Livelihoods with Literacy: Case Studies from Kenya". In, The Kenya Adult Educator Journal of the Kenya Adult Education Association Vol. 6 No. 1, 2001 pp. 3-20.

[11] Rogers, A. Women, Literacy and Development in Kenya. Report of a consultancy undertaken for ODA April-May 1993

Table 2: Formation, Organization and Membership of the Groups

Name of Group	Year of Formation	Nature of Organization	Membership	
			Female	Male
Muisuni Adult Centre and Cottage Industry	1968	Official registration Management in accordance with rules and regulations	22	2
Maguje Women's Group	1980	Official registration Management in accordance with rules and regulations	25	10
Karungu Women's Group	1980	Official registration Management in accordance with rules and regulations	300	
Chandaria Adult Literacy Class	1999	Official registration Management in accordance with rules and regulations	70	

Karungu Women's Group

The Karungu Women's Group started as a self-help group with the objective of mutual assistance to the members. The *merry-go-round*[12] was the means by which the members contributed to a fund from which loans were given on request and in accordance with laid-down procedures. The members integrated their livelihood and literacy efforts with their health care needs, and those of their animals. Animal husbandry is an integral part of their income-earning activities and milk production and marketing is an important source of income. The Constitution and Rules of the Karungu Women's Group make provision for:

- Building of a multipurpose community learning centre
- Establishment of a dispensary

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[12] Small-scale savings and loan scheme.

Table 3: Curricular Orientation

Name of Group	Literacy Components	Livelihood Components
Muisuni	Mathematics Kiswahili, Mother-tongue	Handicraft, tailoring and dress-making, merry-go-round (credit)
Maguje	Math, reading, writing	Business Education
Karungu	Numeracy (reading and writing since 2000)	Merry-go-round (credit)
Chandaria	Kiswahili, Math, Nutrition, weaving, decoration, English	Marketing of handicraft

- Training of the members in modern farming practices
- Improvement of the members' quality of life through income-generating projects

It is assumed that literacy is implied in objective three i.e. "train the members in modern farming practices", otherwise there appears to be no expressed need for literacy. The group has constructed a multi purpose centre which houses a dispensary for both human and animal health care needs.

Maguje Women's Group

The Maguje Women's Group is involved in adult education integrated with agriculture and livestock, and promotion of health care. There is a revolving loan fund, which provides small loans to the members. Literacy is critical to the effective performance of the livelihood activities. Improved communication skills and management of the revolving loan fund are among the learning needs which have been expressed.

Muisuni Adult Literacy Centre

The Muisuni Adult Literacy Centre seems to have the greatest need for literacy, which is related to the functioning of its cottage industry. The needs include planning, budgeting, costing and marketing, which lend themselves to literacy. Other learning needs include keeping accurate records of the manufactured products, records of items sold and calculation of profit.

The constitution of the Muisuni Adult School provides a clear link between literacy and livelihood activities. According to the constitution the school runs formal classes in such subjects as mathematics, languages (i.e. Kikamba and Kiswahili) and health education. Practical activities include handicrafts, carpentry and agriculture "to further the educational and economic welfare of its members". The Karungu and Muisuni groups appear well managed according to laid-down rules and regulations.

Chandaria Adult Literacy Class

The curriculum of the Chandaria Adult Literacy Class includes nutrition, cookery, weaving and bead-making as part of the process of vocational skills training. Marketing skills have been identified by the group as critical to enable the women to generate income as a source of motivation for learning.

From the discussions with the members of the Karungu Women's Group it seemed that they had benefited from the group in various ways including obtaining loans to meet individual needs but neither the amount of income generated nor the loans given out could be verified. However, from the completed and on-going projects it would appear that a substantial amount of income has been generated.

The following table is a summary of the benefits derived by the members.

Table 4: Benefits of Membership

Group	Group Benefits	Individual Benefits
Muisuni		Loans
Maguje	Access to clean water	Literacy Business education Relief food Primary education for children. Heifer for milk production
Karungu	Access to Agro-vet shop Basic education (adult class) Video shows on HIV/AIDS Awareness	Access to Health facilities
Chandaria	Role modeling for teenage mothers	Competences in manufacture and sale of handicrafts

There was evidence that the Muisuni Adult Literacy Centre operated a savings account for which the treasurer of the group had responsibility.

Women's groups in Kenya appear to be a viable channel for development activities. Their increasing number and the quantum of financial resources mobilized by them evidence their viability, as the following table indicates.

Table 5: Motivation Factors

Group	Motivation Factors
Muisuni	Need for literacy Personal development needs
Maguje	To belong to a self-help group Need for education
Karungu	Personal economic needs
Chandaria	Need to belong to a high performance group

The contribution by the groups increased from Kshs. 352.5 million in 1997 to 436.5 million in 2000. Increase in the groups' financial contribution is undoubtedly a consequence of the increase in membership from 3,096,102 in 1997 to 4,419,474 in 2000.

Table 6: Registered Women's Groups 1997-2000

Year	No. of Women's groups	Membership	Contribution	
			Group Million Kshs.	Government Million Kshs.
1997	85,205	3,096,102	352.5	200
1998	97,319	3,900,548	381.8	0.47
1999	107,080	4,287,701	408.2	0.98
2000*	111,688	4,419,474	436.5	1.75

Source: Economic Survey 2001; *Provisional; *US$1=Kshs 78

Conclusion

The case studies indicate that income-generating activities have provided opportunities for the participants and beneficiaries of women's groups to apply skills of literacy and numeracy. The chances of retaining the skills improved and the possibilities for improvement in the level of application also increased. Literacy assumed a functional role in this regard and functional literacy was given practical expression.

Literacy was a critical need in both the management of the organizations and the small-scale enterprises. This need was a source of motivation in the contexts of organizational management and individual development. When motivation is translated into the acquisition of competencies a situation of empowerment may be realized.

The management of the organizations by the women offered tremendous opportunities for learning and the development of their self-esteem. As they directed their own activities they tended to change their perceptions of the stereotypical roles of women.

Most of the groups did not start with literacy as a primary purpose for group formation. The desire for mutual assistance, mainly financial, as indicated by the merry-go-round, was the motive for coming together. The Karungu Women's Group illustrates this very well; they saw the need for literacy twenty years after they had been in existence and after they had successfully completed a number of development projects including the construction of a multi-purpose building, part of which is now used as the venue for literacy classes. Mwangi (op. cit:17) explains the motivation for literacy:

> *"As the group received more members, some of whom were illiterate, it became evident that a literacy class had to be started to enable the non-literate members to keep records and receive training in health, agriculture and livestock rearing."*

Another conclusion which can be drawn from the case studies is the sense of community which the groups provided for the members. Mutual assistance and solidarity were given expression in times of need. Putting bread on the table was the primary objective of the women's groups, whose individual needs seem to have been in competition with those of their family members, especially their children. The loans obtained from the groups mainly went into payment of school fees, and purchase of utensils. The design of literacy programmes, therefore, should take account of these needs and how to address them.

Literacy in Context

Using literacy is emerging as the dominant paradigm in the adult literacy discourse. One can hardly talk about uses of literacy without talking about the contexts in which literacy is used. The context, therefore, is as important as the content and the purpose of literacy. This undoubtedly has a number of curricular and pedagogical implications. First, the nature of context will determine to a large extent the content of the programme and the methodology for its transmission. What is taught, how it is taught and the context in which it is taught are important. For example, preparation of a bill of costs and record keeping could be the content for numeracy and literacy in the context of income-generation. Real literacy or meaningful literacy ought to be situated in real situations. In the view of Barton (1992) "...people do not read in order to read, or write in order to write; rather people read and write in order to do things, in order to achieve other ends".

Recommendations

Expanding the Vision for Literacy

There is an urgent need for a critical re-examination of the objectives of literacy in the light of the changing needs and circumstance of the learners. With the increasing levels of poverty the role of literacy in poverty alleviation should be re-examined with a view to formulating strategies on how it can be effectively used to put bread on the table.

Establishing Functional Links between Literacy and Livelihood

Literacy programmes whose objectives are not linked to the basic needs and rights of the learners are likely to fail. The demise of many literacy programmes, as indicated by the falling enrolment rates, evidences this assertion. Meeting short-term basic needs is important but the need for the learners to be equipped to exercise their basic rights seems more important. Exercise of basic rights will have tremendous implications for meeting basic needs. Literacy programmes should therefore seek to address the underlying causes of poverty which, by and large, are structural. Utilization of the variant of participatory methodology will go a long way to fulfilling this objective.

Acknowledgements

Thanks are due to Mr. Ephantus Njiru of the Kenya Adult Education Association (KAEA) for his assistance in data collection. Without the cooperation of the members of the Karungu, Muisuni, Maguje and Chandaria learning groups, it would have been difficult if not impossible to accomplish this task.

The workshop "Exploring Multilingual Community Literacies" was held in September 2001 in Kampala, Uganda. The workshop was jointly organized by the Research Centre on Multilingualism of the University of Hamburg (Germany) and the Institute of Languages of Makerere University (Uganda) The objective was to explore the many different ways in which literacy is used and valued in the various linguistic communities. We reprint here the discussion papers by Anthony Okech and Godfrey Sentumbwe. Anthony Okech, a long-standing partner of our Institute and a senior member of the Institute of Adult Continuing Education of Makerere University, Kampala, Uganda, reports on the experience of the "multilingual literacy" approach in Uganda. Godrey Sentumbwe, Programme Manager of LABE (Literacy and Basic Adult Education) in Kampala, examines the question whether in a country such as Uganda with very many ethnic groups, literacy should be taught in the mother tongue or the local language, or in the official national language, English. Both papers have appeared in the proceedings of "Exploring Multilingual Community Literacies. Workshop at the Ugandan German Cultural Society, Kampala, September 2001", ed. Christine Glanz and Okot Benge by kind permission of the Research Centre on Multilingualism, University of Hamburg. The project is supported by the German Research Society (DFG).

Anthony Okech

Multilingual Literacies as a Resource

1. Policy Framework

Uganda's officially stated policy on language in education recognises and provides for multilingual literacy. In the 1992 White Paper on Education, which provided the policy that still guides most of educational development and activities in Uganda, the Government provided as follows:

- In rural areas the medium of instruction during the first four years of primary school education would be the relevant local language (not "mother-tongue" as recommended by the Commission from whose report the policy was drawn – this will be commented on later in the paper).
- The rest of formal education was to be carried out in English as the medium of instruction (in urban areas English would be used from the start of primary education).
- Kiswahili and English were to be taught as compulsory languages throughout primary and secondary education, with growing emphasis on Kiswahili at the later stages.
- The area language was to be taught as a subject in both rural and urban areas: it would be examinable but not compulsory at Primary Leaving Examination (PLE).
- From Senior 1 (first year of Secondary School) students were to be encouraged to take another foreign language and, optionally, one major Ugandan language.
- Choice of language in basic literacy programmes for adults would be the responsibility of the local authorities.

The multilingual strategy encouraged in Uganda's education system recognizes what is today regarded as a basic right: to learn literacy in one's first language. Psychologists and experts in the teaching of reading and writing argue that pupils acquire literacy much better and more permanently when they start in their first language and then transfer to another language, than when they try to learn it directly in a second language. The multilingual strategy therefore promotes better learning.

Although the approach recommended according to the policy quoted above is not practically possible in a number of cases even in the rural areas because of the highly mixed populations, the fact that it is provided for and made possible is very important. The extent to which practical strategies have actually been put in place to translate the policy into reality will be examined in the next section of the paper.

The policy on language in education reflects Uganda's strategy of creating unity in diversity, in this case linguistic diversity. Governments in Uganda have at various stages tried to bring about the adoption of a national language for the promotion of greater unity among Ugandans. The language that has been recurrently promoted for this purpose has been Kiswahili, to facilitate communication not only at the national level but also at the inter-territorial level, since Kiswahili is spoken in much of Eastern and Central Africa. The policy quoted above has also put special emphasis on learning Kiswahili throughout the primary and secondary school with the intention, as stated in the White Paper, of promoting the adoption of Kiswahili as a national language.

This effort to promote Kiswahili, like the others before it, has not received much practical support. The multilingual approach seems to be more favoured. In this situation, multilingual individuals are an important resource. They are a bridge, through speech or writing, between those who do not share the same language.

2. Current State of Multilingual Literacy in Uganda

The majority of Ugandans are at least bilingual, and many are multilingual in three and more languages. Comprehensive up-to-date figures are not readily available, but statistics from a sample used for the 1999 evaluation of the Functional Adult Literacy Programme in Uganda may give some indication. The sample of 938 programme participants from 8 districts representing all regions of Uganda was composed of adults, about 80% of them women, who had either not gone to school at all (27%) or completed only a few years of schooling (36% completed four, 23% completed five) (Okech et al. 1999). Yet an amazing 86% of them spoke at least one other language apart from their own. There were surprising statistics like 47% from Arua District and 54% in Soroti District claiming to speak some Luganda, which not only belongs to another language family, but is also geographically removed from the two districts. Practically none of the sample reported being able to speak English.

In view of the above situation, where people can transfer their literacy from one language to another, there should be a high level of at least bilingual literacy in Uganda. This seems to happen to quite a great extent, although the transferability seems to be easier among some languages than among others. For example, there are considerable percentages of people in many districts of Uganda who speak Luganda but find it very difficult to read and even more difficult to write. Among the schooled population, there is the additional problem of many who find it difficult to read and write their own first language.

The evaluation just referred to found that the first four years in most rural schools are de facto taught in the local language, rather than in English. English is just taught as a subject, using the local language. However, the fact of teaching in the local language is not really in response to the policy contained in the 1992 White Paper. It is rather because the teachers and pupils find it difficult to use as a medium of instruction a language which the pupils do not use outside class and which they have not yet learnt. Both the teachers and the pupils were given an open choice as to which language should be used in administering a literacy and numeracy test to pupils in the fourth year of primary school and both groups chose the local languages, in all the eight districts. This was even the case in town areas.

While the medium of instruction in the first four years is the local language, most of the local languages do not have any text-books, other reading books or other learning and teaching materials. Partly because of the lack of books and other materials in the local languages and partly because of the rather poor quality of the education offered, due to various reasons, the pupils do not achieve a significant level of literacy during those first four years. The test administered during that evaluation revealed that, after three and a half years of schooling, the pupils had not achieved a level of literacy any better than adults who had never been to school but had attended only nine months of adult literacy programmes, for two to three hours a day, two or three times a week.

After the fourth year in Primary School, the emphasis starts shifting to English, the language in which the Primary Leaving Examinations are held. With the rather inadequate amount of literacy acquired by Primary Four level, the shift to English greatly reduces the proficiency of literacy in the first language. The result is the rather low level of local language literacy among the more schooled population and their tendency to prefer to write in English. Many of them find it difficult even to read their first languages. This situation is reinforced by the fact that, currently, the better-performing schools are those which start with English as a medium of instruction right from the beginning of primary education.

In adult literacy programmes, the medium of instruction is the local language of the area where the programme is taking place. As already mentioned, the evaluation carried out in 1999 found that adults who have completed one cycle of basic literacy education compare favourably with Primary Four pupils. One possible explanation may be their concentration on the use of their mother tongue at this initial stage (for most of them). They are not therefore distracted by the interference of another language with a rather different type of orthography. However, the insufficiency of being literate in one's first language only has made many of the adult literacy programme participants call for literacy in English after some basic literacy in their local language.

3. Multilingual Literacies and National Unity

Communication at national level in Uganda, both horizontal and vertical, involves multilingual literacy. English is the official language of Uganda and most official documents, whether from the Government or other organisations, are in English. Many of these documents must reach those who do not speak, read or write English. They have therefore to be translated into the languages which the people speak. The ability to do this is therefore an important resource.

Because of the rather low level of local language literacy proficiency, much of the translation is often from literacy to oracy. Instead of taking the trouble to translate in writing from English to the local language, in many cases the literate bilingual reads the text in English and speaks out in the local language. This has of course its limitations, but it is already an important bridge. However, the Government and other organisations have increasingly adopted the practice of translating key documents into selected local languages. The number of languages into which the documents are translated depends on how necessary the authors feel it is for the document to reach the people in their own languages.

There is also a growing practice of producing some documents in bilingual versions, in a few cases in even more than two languages. This enables those with multilingual literacy to access the document in their own language while being able to compare it with the original, usually English, version. Such individuals can also help those with only monolingual literacy to make the comparison.

Multilingual literacy in local languages facilitates what could be referred to as horizontal communication among different language speakers in Uganda. This is practised to some extent, although it is limited by what has already been referred to as the low level of local language literacy.

4. Multilingual Literacies and the Mother Tongue

As mentioned at the beginning, the Education Review Commission, from whose report the 1992 White Paper on Education was drawn, had recommended that the medium of instruction in the first four years of primary schooling should be in the mother tongue. The Government changed this to "relevant local language". This was in recognition of the fact that the population of Uganda is highly mixed, not only in the urban, but also in the rural areas. Some villages in rural areas could have people of five or even more different mother tongues. In practice it is therefore not always possible to respect the right to learn literacy in one's mother tongue, especially when it is to be used as a medium of instruction.

The practical implementation of the multilingual approach in Uganda's formal education system has, in addition, not seriously respected the principle of beginning literacy in the mother tongue. In the formal education system, during the colonial days, and for some years after independence, six languages were given predominance over others and used as the medium of instruction during the first years of primary schooling. They were given the title of "vernacular" and there was even a grade of teachers called "vernacular teachers" who were trained to teach in one of those six languages.

What this practice did not recognise was that some of these vernaculars were truly foreign to those made to learn literacy in them. This was, for example the case in a District like Bukedi (now Tororo, Pallisa and Busia), where Luganda was the vernacular and yet the district was home to three language families: Bantu, Eastern Nilotic and Western Nilotic. It was partly because many Ugandans felt that they were already learning literacy in a foreign language anyway that at a certain stage there was the move to start learning in English right from the beginning of the Primary School.

5. Multilingualism and Access to Information

One important aspect of multilingual literacy is that it should promote access to information which is available in various languages. In Uganda, written information is accessible mainly in English and, to some extent, in Luganda, less in the other major languages of Uganda. As a result of this, multilingual literacy in the local languages of Uganda does not open the way to much access to information. It is this reality that prompts participants in adult literacy programmes to demand literacy in English as soon as they have acquired some literacy in their local languages.

The 1999 evaluation of the Functional Adult Literacy Programme, which has already been referred to, found that many of those who had acquired the basic level of literacy in their local language practised very little reading because they had practically nothing to read in their local language. It would seem that, unless there is a dramatic change in the literary scene in Uganda, the only multilingual literacy that opens access to information in Uganda will for some time include English or Luganda, and to a lesser extent one of the other "major" languages: Runyoro-Rutooro, Runyankore-Rukiga, Luo (Lango and Acholi) and Ateso.

6. Cost and Cost-Effectiveness

One main constraint often cited in the promotion of multilingual literacy in Uganda is that of the cost of preparing and producing textbooks and other teaching and learning as well as reading materials in so many languages (over 30 in Uganda). The Functional Adult Literacy Programme run by the Government has been able to produce up to four titles in about twenty languages for the basic literacy and follow-up reader activities. This has been done using a very small budget, but has also reached only a very small percentage of those who need the programme. Even though so few have been reached, this is a sign that something can be done, with a somewhat bigger budget to prepare and produce basic learning and teaching materials in all the languages of Uganda.

The Government has usually given the lack of resources as a reason for not being able to cover all the local languages in the formal education system and has instead been handling the issue through projects that tend to focus on the same "major languages". Currently there is a project being worked upon which will cover more languages, but still not all the languages. The aim is, however, to cover all the local languages eventually.

The bigger challenge will come when one looks beyond the learning stage to the use of the literacy skills. Access to information and literature in many of the languages may not increase much when one considers the dynamics of market forces. Publishers have so far shown very little interest in publishing in some of the smaller languages because they know the market is very small. Not only are the speakers of these languages few but they are also generally very poor. Their priority expenditure out of their little income will therefore most likely not be on books and other reading materials but rather on the basics for survival. However, there will always be many situations and events where local language and multilingual literacy will come in useful. It is therefore worth the effort.

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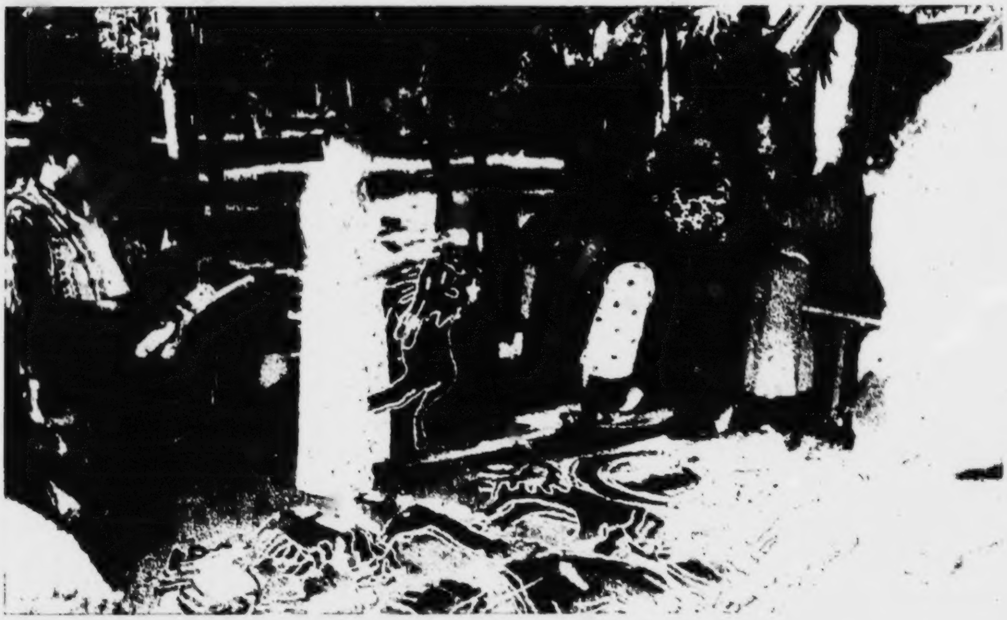

Muisuni Mackakos Women Group, Cottage Industry, Kenya

Photo: Danson Mbaria, PLP

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Godfrey Sentumbwe

Ethnic Differences in the Approach to Adult Literacy: Experiences from Nationwide Literacy Training

Ethnicity in Uganda

Uganda is a multi-ethnic country, comprising more than 40 clearly distinct ethnic groupings. The main divisions are between the Nilotic groups in the north and the Bantu groups of the south. The 4 major ethnic groups by type and name are: the Bantu, the Nilotic, the Nilo-Hamitic and the Sudanic. In each of these ethnic groups, such as the Bantu, there are large language groupings (e.g. Ganda speakers) and very small language groupings (e.g. the Baruli). Even in one language grouping, the spoken and written languages are not automatically homogenous! Different dialects exist in each grouping.

Adult Literacy Training: A Problem-ridden Case

It is now widely accepted that there are many different meanings of literacy or literacies. However, this has generated a lot of confusion for adult literacy practitioners, especially for trainers and instructors in the field. Adult literacy has quite often been looked at as functional adult literacy or literacy for conscientisation/empowerment. These are interpreted differently by different people. In the hands of the naïve, ideology has overwhelmed pedagogy and the so-called awareness has overwhelmed learning of skills – a very big problem indeed.

The second big problem is the duration of training provided to literacy workers whose academic education levels are very limited. There are some ethnic groups lacking standardised orthography and reading materials in print. A short duration of less than one week cannot provide literacy workers with the level of competency needed to address the different demands of literacy learners.

A third big problem to be examined later is the learners' demand to start literacy learning in English, even when they are completely non-literate in their own mother tongue!

LABE and Adult Literacy Training in Uganda

Adult literacy training has been one of the core activities of LABE ever since it started as a small organisation over 10 years ago. LABE works through partnerships with: the central government (especially the Ministry of Gender, Labour and Social Development to deliver strategic literacy training services), local governments, district NGOs, Community Based Organisations or CBOs (in training literacy workers, production of literacy materials, setting up community literacy resource centres and piloting innovative approaches), international NGOs (through joint training of literacy workers) and higher adult education training institutions (by providing field work placements for trainee students).

We have worked in districts with the following key features: those with the lowest literacy rates (e.g. Kotido and Moroto – literacy rates below 15%), those with diverse ethnic languages which are not closely related (e.g. Arua and Adjumani), those urbanised districts such as Jinja, where indigenous languages may not be central in literacy work and those districts with a big population speaking one language, but still grappling with standardising their orthography (such as in Kamuli, Iganga, Jinja, Bugiri and Mayuge). These distinct features existing in the districts have transformed us into a learning organisation, ready to adapt, adopt and be adept with innovative training ideas.

Adult Literacy Training Agencies in Uganda and their Approaches

Literacy was first introduced to Uganda during the late 19th century by Islamic and Christian missionaries. For many years, it was only the missionaries who provided the literacy training. The colonial government joined gradually, especially after the Second World War in order to keep demobilised indigenous soldiers usefully occupied. A department called "the Department of Public Welfare" was established. This was the forerunner of the Department of Community Development, which is currently in charge of adult education.

In 1964, independent Uganda launched the national mass literacy campaign, using the traditional general approach to teaching reading, writing and simple numerical skills, independent of function or context The campaign was in 22 languages, with a primer and follow-up reader in each of the languages. In 1966, under the influence of UNESCO, the idea of functional literacy was introduced. It was an attempt at enriching the traditional literacy approach used in the mass campaign, though with limited success. The campaign lost its steam until 1971, when Idi Amin gave it a temporary boost. However, by the time he was overthrown in 1979, there was little government provision of literacy programmes. This situation lasted until early 1990, when a new Functional Adult Literacy (FAL) Programme was launched. This campaign enabled a number of individuals to acquire a rudimentary ability to read and write their names, but it was also beset with problems of poor campaign design, lack of harmonised curricula and implementation plans, poorly prepared reading materials and the use of untrained adult literacy teachers and sometimes schoolchildren.

Apart from government and LABE, other NGOS, both local and international, have provided literacy training services The list includes international NGOs (like Action Aid, Save the Children Fund, UNHCR) and national/regional NGOs (like SOCADIDO in Soroti, CEFORD in West Nile and several others). Action Aid developed an approach to education with literacy called "REFLECT" in early 1993. In this approach, they attempted to abolish the primer and other pre-printed materials. It is too early to say whether this approach is the solution to the traditional approach to literacy training.

Language and Adult Literacy

Language and Literacy Learning: Mother tongue? Local language? Official language?

One of the ongoing issues for us concerned with literacy in a country like Uganda – a country with many ethnic groups – is to know in which language literacy instruction should be provided. Should it be in English? Is there a local language of the majority of the people that should be used? Or should literacy instruction be focused on numerous local dialects and languages? The choice in he Uganda context is not a straightforward one. We have come across languages that are scantily written, yet they effectively function at the level of oral communication.

There is a growing awareness that there is no universally applicable form of literacy. There are different literacies and literacy practices for different groups, and for different social contexts. Literacy teaching and training programmes for adults seek to help the participants with very specific types of reading and writing. Language concerns (mother tongue or standardised languages) are regularly reflected in current debates about adult literacy. Issues surrounding minority languages and the rights of different groups to use them, the power relationships involved in language – these are features that also affect adult literacy programmes in Uganda.

Who Uses Which Kind of Literacy for Which Purpose?

One of the tenets in adult learning psychology is that adults learn for a purpose. But there is always a clash between literacy providers and learners regarding language for literacy learning. Whereas providers are convinced that literacy learning should first be in the mother tongue of the learners, the learners often prefer literacy in the official (English) language. The demands of these participants differ from place to place. Creating reading materials in diverse languages is an urgent need in many literacy programmes in Uganda. But it is equally arguable that many learners are hesitant to learn literacy skills in their own local languages when they are aware that they cannot use such skills to achieve any purposeful change in their own lives.

Dealing with the Challenges of Adult Literacy Training in Uganda

The Outstanding Questions in Adult Literacy Training

How can a small organisation with limited staff – both in numbers and ethnic composition – address the challenge of ethnicity and literacy training? How can one address the problem of reading materials in groups where the printed word is scarce? In what dialects should these materials be produced? Should there be a standardised approach for adult literacy training for all these ethnic groups? Is literacy learning and skills application limited to only a few ethnic groups? Do socio-economic factors reduce the challenges posed by ethnic differences to adult literacy training?

LABE's Adult Literacy Training Delivery: The Cascade System

To reach large-scale delivery of adult literacy training for different ethnic groups, LABE trains literacy trainers (tutors), who in turn train literacy instructors (teachers) in their own localities. The language used in training trainers is English, while the language trainers use in their localities is the mother tongue or local language of the community. This cascade system is effective for nation wide training institutions like LABE, but it may not work effectively for organisations that impart literacy skills and knowledge directly in literacy classes.

Literacy Materials: Which formats in Which Language and Where from?

The most visible aspect of a literacy programme is the package of teaching and learning materials used. The formats of these materials are not uniformly abundant in all ethnic groups. There are "lucky" groups, such as the Baganda, Acholi and Runyoro/Toro speakers who have a good number of materials available in their languages. These exist in printed book form, printed non-book form and audio-visual electronic formats. Very few of these materials exist in marginalised ethnic groups like the Kakwa or the Sarnia. If at all there, they are limited to a few books such as the Bible. In such communities, LABE trains instructors and their learners to produce learner-generated materials in their own languages. These can be printed on surfaces like polythene ("kavera") sacks using marker pens. Further training in translating existing texts from English into local languages is attempted. Learners and their instructors have been enabled to multiply reading materials in their languages even when the orthography is not yet standardised.

The Literacy Training Package for Trainers: Standardised or Diversified?

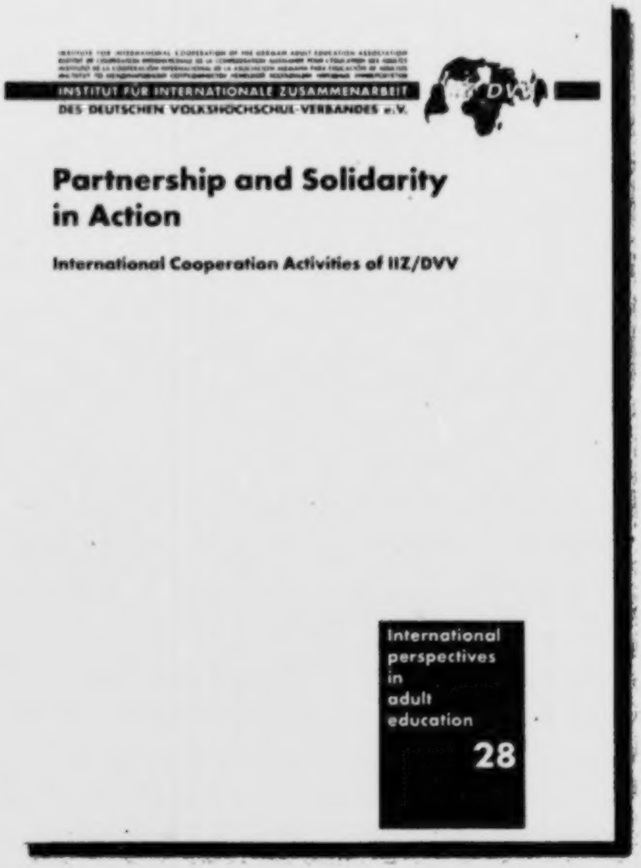
Modem approaches to adult literacy education point out that there are many different literacies for different groups – ethnic groups, occupation groups or religious ones. As a result of these differences, a standardised literacy training package for literacy workers would not be the best approach to all these groups. Some national literacy training agencies in Uganda, however, have failed to deal with this problem. The FAL programme has a national literacy training manual. Until just recently, Action Aid was using what they were calling the REFLECT "Mother" Manual. ME has opted for a trainers' LITKIT, a form of literacy toolbox that trainers from different contexts can adapt for use in their own training. We have extensively pre-tested it with different groups where we work. Still in draft form, it is expected to be launched early next year – January 2002. It is a form of diversified training package and trainers can modify it to suit their local contexts.

Literacy Learning. In Local Languages or English?

We have encouraged different groups to consider instructing literacy in mother tongue or local languages before moving into literacy in English, especially in rural-based communities. In multi-ethnic communities, like in urban centres, we offer training support to groups delivering literacy in English. However, there has been the problem of failing to distinguish between English literacy learning and English language learning. This is a complex issue for literacy instructors who have little or no special training in this area.

Conclusion

The use of mother tongue instruction or the official language (English) in adult education remains a topic of continuing debate. Our experience with adult literacy learners from different ethnic groups has shown that if they are to continue with literacy skills learning after the initial literacy cycle, then a shift from local or mother tongue instruction to English instruction should be attempted. This is due to issues of power and status, which some languages are associated with – and in the Ugandan context, it appears English has both.



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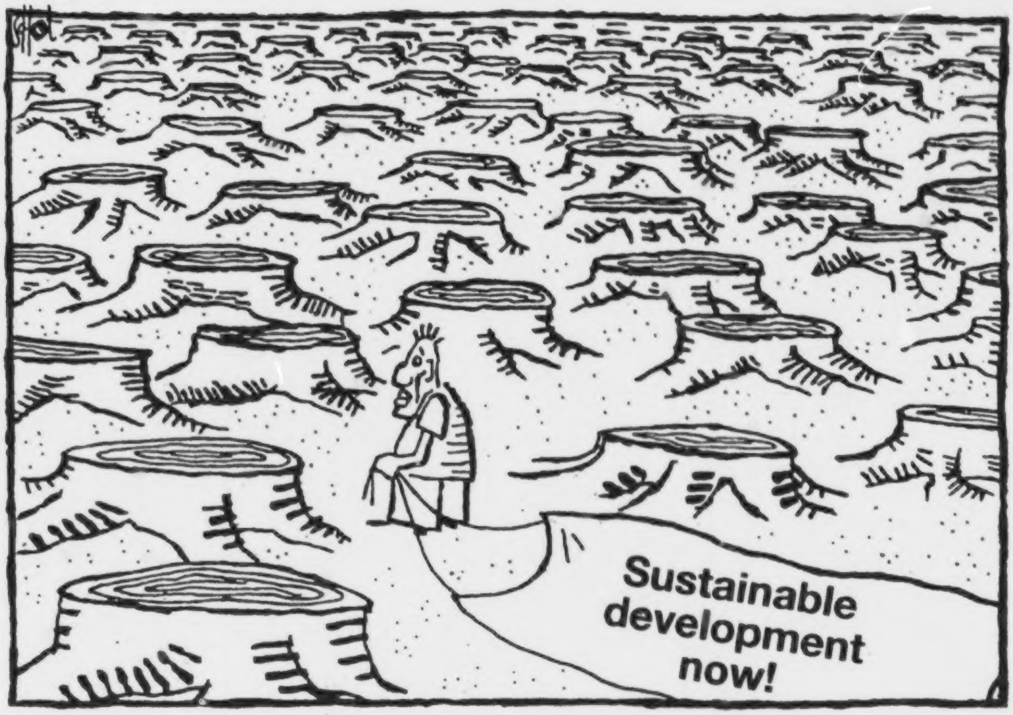
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This paper gives an overview of adult education in Uganda, paying particular attention to rural development. The paper explores the importance of adult education in sustainable development and highlights some of the challenges faced in the bid to provide education für the adult population in Uganda. The paper focuses mainly on agriculture, which is the backbone of the Ugandan economy and on which most other sectors depend. Forough Olinga works for the Integrated Support to Sustainable Development and Food Security Programme of the Food and Agriculture Organisation of the United Nations (FAO) in Uganda. Margaret Lubyayi is Chairperson of the Katosi Women Fishing and Development Association, Uganda. The article was first published in Africa Insight, Vol. 32 No. 1, March 2002, pp. 44-49. It was also presented at the Project Literacy Conference on Adult Education and Sustainable Development, November 2001 in Johannesburg, South Africa.

Forough Olinga/Margaret Nakato Lubyayi

The Role of Adult Education in Sustainable Development

Education Creates the Enabling Environment Necessary for Development

Uganda is a country of plateaux and hills, marshes and lakes, stretching between the two arms of the Great Rift Valley, at the heart of the

Great Lakes region of East and Central Africa. Once described as "the pearl of Africa", the name "Uganda" was derived from the ancient kingdom of Buganda, which occupied most of the central part of the country. After gaining independence from Britain in 1962, Uganda prospered briefly, then entered two decades of political turmoil, state-sponsered violence, economic decline and civil war.

The National Resistance Movement (NRM), led by the current President of Uganda, Yoweri Kaguta Museveni, came to power on 26 January 1986, after a five year conflict. The NRM government has restored security in most parts of the country, re-established the rule of law, promoted freedom of expression, revived the economy and enabled widespread democratic participation in community and economic affairs.

Since 1993 Uganda's economy has grown at around 7% per annum. Yet Uganda remains one of world's poorest countries, ranked 158 out of 174 countries on UNDP's Human Development Index for 1997.[1] GNP per capita is estimated at US$330. Some 44% of the population live below the absolute poverty line of US$34 per capita per month, and only half the population have access to safe drinking water. Poverty is largely a rural phenomenon, and it is in the rural areas that nearly 86% of the Ugandan population live.

Uganda has a total population of 21 million, of whom 51% are women and 49% men. Agriculture is the backbone of the Ugandan economy, accounting for over 80% of the labour force. Most agricultural production comes from smallholders, the great majority of whom cultivate less than 2 hectares of land, using traditional methods of farming and family labour. The greater part of their cash income comes from traditional cash crops such as coffee, cotton, tea and tobacco, but income from the sale of food crops such as maize and beans is becoming increasingly important.[2]

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1 UNDP, Human Development Index, Geneva: UNDP, 1997.

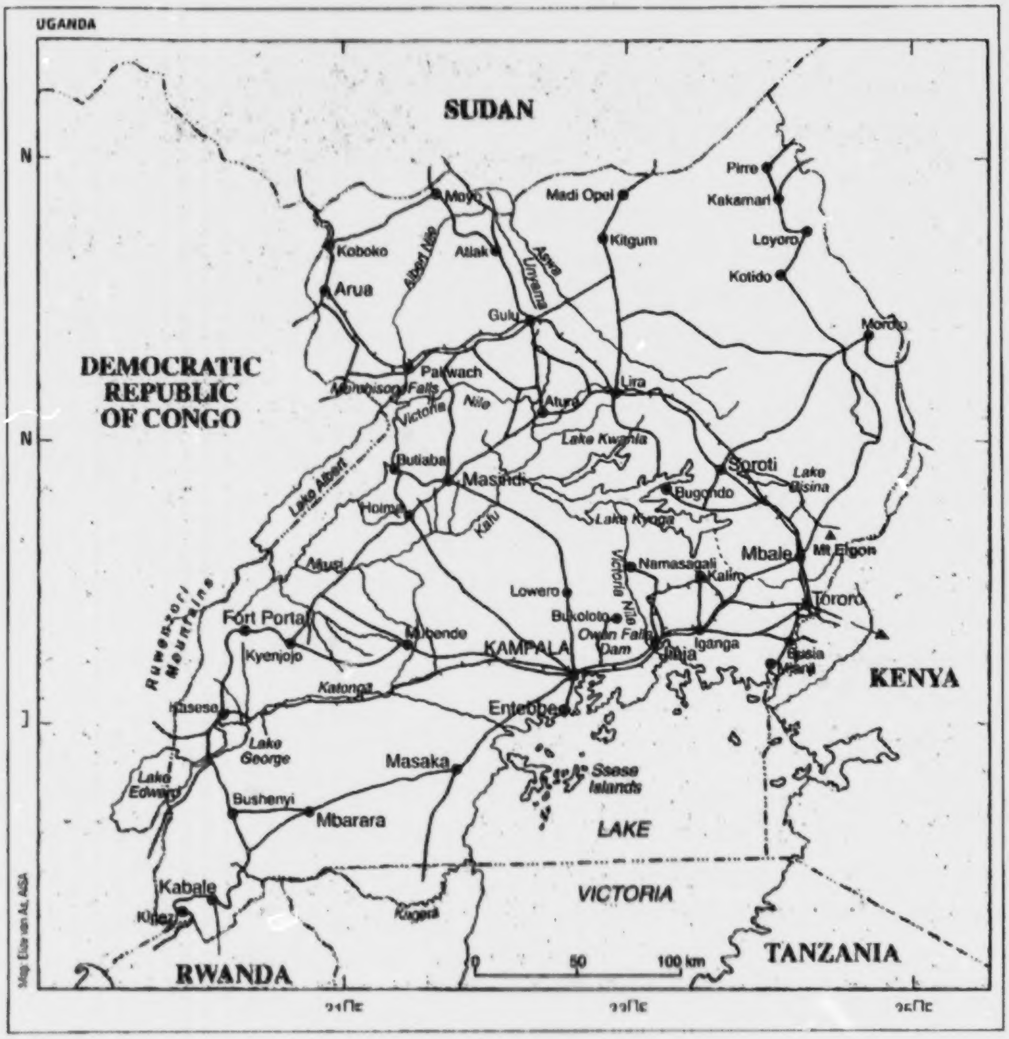
2 Uganga: Promise Performance and Future Challenges, Common Country Assessment of the United Nations Agencies Working in Uganda, Kampala: UNDP, 2000.

Most people in rural areas derive their food and income from the crops they plant, the livestock they rear, and the fish they catch. Women carry out 70-80% of all agricultural work (digging, planting, weeding, harvesting, storage and processing) although they have little control over the land itself or the sale of cash crops (see Table 1). Traditionally, land belongs to men, who also control the sale of cash crops and large sales of food crops, although in some areas these traditions have changed in recent years.

Indicator or parameter	Percentage of total	
	Female	Male
Population	51%	49%
Agriculture labour force		
• Food production	80%	20%
• Planting	60%	40%
• Weeding	70%	30%
• Harvesting	60%	40%
• Processing/preparation	90%	10%
Access to and ownership of land and related means of production	8%	92%

Table 1: The contribution of women to agricultural development in Uganda
Source: Ministry of Gender, Labour and Social Welfare, Kampala, Uganda, 2000.

In many parts of pre-colonial sub-Saharan Africa, land was considered sacred, and often regarded as female. Both men and women peasants had more or less equal rights to land in some parts of Uganda. Both men and women decided on the activities to be carried out on the land, and what to do with the proceeds from the land. This state of affairs changed as land gained a monetary value, primarily under the advent of colonialism. The first victims were women because rewards in the form of land mainly went to the educated males.


UGANDA
SUDAN
DEMOCRATIC REPUBLIC OF CONGO
KENYA
TANZANIA
RWANDA
Pirre
Kakamari
Loyoro
Kotido
Madi Opei
Moyo
Kitgum
Koboko
Arua
Atiak
Albert Nile
Aswa
Unyama
Gulu
Moroto
Pakwach
Murchison Falls
Victoria
Nile
Lira
Aturu
Lake Kwania
Soroti
Lake Bisina
Butiaba
Masindi
Bugondo
Lake Albert
Hoima
Kafu
Lake Kyoga
Mbale
Mt Elgon
Namasagali
Kaliro
Victoria Nile
Muzi
Lowero
Tororo
Rwenzori Mountains
Fort Portal
Bukoloto
Owen Falls Dam
Jinja
Iganga
Busia
Mubende
KAMPALA
Kyenjojo
Katonga
Kasese
Entebbe
Lake George
Masaka
Ssese Islands
Lake Edward
Bushenyi
Mbarara
LAKE
VICTORIA
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50
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Map: Elize van As, ASA

Access to land by women became largely determined by kinship rights, and as part of marriage. The emergence of a cash economy forced many men into direct competition with women for land access and the control of women's productive labour. The loss of control over land was, of course, an abrogation of the human right of women to economic independence. Women had hence to be dependent on the very men who had destroyed their rights.

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Education and Gender Inequality in Uganda

The importance of adult education in development cannot be overstated. Adult education is one of the pillars for sustainable development. This is because education should be an ongoing process in one's life. The issue of adult education is becoming more important now, especially with the reality of gender awareness. Various authors point to the importance of female education in achieving sustainable development.[3] However, the statistics relating to literacy in Uganda show that women lag behind men: only 57% of women are literate as compared to 74% for men. The significant proportion of the illiterate population in certain areas of the country, however, is over 50%, with women forming the greatest number.[4] Poor farmers, in a participatory poverty assessment carried out in 1999 in rural areas, ranked lack of education and skills (after lack of access to markets) as the second greatest cause of their poverty.

In most Ugandan families, moreover, boys are considered a treasure. A woman who has not given birth to a boy in a family is considered worthless, as she is not able to produce an heir to carry on the family name and inherit the assets. The first schools that were established in Uganda for women were intended to train women who would become the wives of chiefs in mainly social graces and home economics. Obviously, this education was only suited to a very small number of women while many others continued to toil in the fields. Even later when schools were opened to more women, they were discouraged from taking subjects other than social sciences, which women are supposedly good at.

Limited efforts have been made to provide functional adult literacy to women and men who, through tilling the land, support the economy, which depends on agriculture. The World Bank has argued that education can help alleviate poverty and advance economic and social development.[5] Numeracy and literacy are valuable skills for workers, even those outside the modern labour market such as rural farmers. For example, farmers with these basic skills can allocate inputs correctly and use products of technological change such as pesticides and medicines, thereby increasing productivity.[6] Many fertilizers when wrongly used can cause damage both to the environment and their users. Unfortunately, women make up most of the illiterate population despite their significant contribution in agriculture.

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[3] ME Lockheed and AM Verspoor, Improving Primary Education in Developing Countries, Washington DC: World Bank, 1992; A. Odaga and W. Heneveld, Girls and Schools in sub-Saharan Africa: From analysis to action, Washington DC: World Bank, 1995; B Herz, Letting girls learn: Promising approaches in primary and secondary education, Washington DC: World Bank, 1995.

[4] Adult literacy programs in Uganda, Washington DC: World Bank, 2001.

Furthermore, educating women is noted to reduce fertility and lead to improved child health, among a host of benefits.[7] Children of educated mothers have been found to live healthier and longer lives since women with education are more likely to seek professional healthcare. It is thus the contention of the authors that education must be promoted at all levels if sustainable development is to be achieved. Given the country's dependence on agriculture and women's strategic position in the sector, women's functional literacy, especially in agricultural activities, must be strongly promoted.

The Poverty Eradication Process in Uganda Since 1986

Since the coming into power of the National Resistance Movement in 1986, various processes have been put in place to boost the performance of the economy and eradicate poverty. During the second half of the 1990s the Government of Uganda launched a succession of important constitutional, legislative and policy initiatives, which embody principles, ideals and specific elements drawn from several UN conventions, conferences and other international treaties. These include:

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[5] E. Kane, Seeing for yourself: Research handbook for girls' education in Africa, Washington DC: World Bank, 1996.

[6] K. Subbarao and L. Raney, Social gains from female education: a cross-national study, Washington DC: World Bank, 1993; Lockheed and Verspoor 1994.

[7] Kane 1996.

- the Ugandan Constitution (1995)
- the Poverty Eradication Action Plan (1997/2000)
- the Plan for Modernisation of Agriculture (2000)
- the Local Government Act (1997)
- the Universal Primary Education programme (1997)
- the National Gender Policy (1997)
- the Vision 2025 Strategic Framework for National Development (1998)
- the Land Act (1998)
- the National Health Policy and Stategic Plan (1998)

We shall examine some of these important initiatives that have been undertaken in Uganda in a bid to achieve sustainable development.

The Ugandan Constitution of 1995

The Ugandan Constitution was promulgated in 1995 and was widely welcomed by most Ugandans for its rights-based and gender-sensitive outlook. The Constitution clearly enshrines the equal rights of both men and women in Uganda. The Ugandan Constitution also paved the way for a decentralised system of government, which brings services closer to the people. Due to high illiteracy rates, however, many Ugandans are still unable to read or indeed understand their own Constitution.

The 1995 Uganda Constitution stresses the principles of gender equality. In agriculture, like in other sectors of our economy, gender is crucial since men and women play different roles. These complementary activities change over time and create new opportunities for both female and male farmers in technology generation, adoption and transfer. Therefore, gender dynamics are fundamental to planning and policy interventions.

In most Ugandan families, a woman who has not given birth to a boy is considered worthless, as she is not able to produce an heir to carry on the family name

The law is an important tool in enhancing agricultural activity. Some of the existing laws, however, are archaic and discriminate against women. Marriage laws, succession laws, divorce laws and many others still hold sway over rural women. Such laws often fail to protect women's rights within and outside the home and call for immediate intervention and reform. The consequence of poor laws is eventually revealed in the poor performance of various sectors of the economy, including agriculture.

The Poverty Eradication Action Plan, 2000

The Government of Uganda, in consultation with various stakeholders, came up with a Poverty Eradication Action Plan (PEAP) in 2000. The PEAP is Uganda's equivalent of the Poverty Reduction Strategy Paper (PRSP) required of developing nations by the World Bank. The Government has set poverty eradication as its top priority and as such the PEAP may be seen as the overriding policy to which other policies are expected to conform (e.g. gender policy, land policy and others).

The PEAP acknowledges that land ownership is a tool for poverty eradication and for achieving national development. The strategy also notes thal ownership of land is one of the most fundamental human rights in Uganda's Constitution. However, the Government of Uganda recently contradicted itself by rejecting the inclusion of a clause on co-ownership of land by spouses that was advanced by various women activists. The argument advanced by those against the clause was that co-ownership would make land less marketable.[8] Denied ownership of land and other property, women lack the security needed to acquire bank loans, which severely restricts their capacity to undertake productive activities, increase their incomes and ensure food security in their families.

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[8] Uganda Land Alliance, Workshop on the Launch of the Working Document on a National Land Policy, Kampala, 26 October 2001.

The Plan for Modernisation of Agriculture, 2000

The PMA is a significant part of the Government's broad poverty eradication strategy contained in the PEAP. The mission of the PMA is to "eradicat[e] poverty by transforming subsistence agriculture to commercial agriculture".[9]

The PMA contends that through the improvement of the welfare of poor subsistence farmers, there will be a re-orientation of production towards the market as more produce will be marketed to enable farmers to earn higher incomes. The following are the priority areas that were identified by poor farmers in Uganda and which will be the focus of the PMA:

1. Access to credit and financial services
2. Control of crop and livestock pests and diseases
3. Improved market access
4. Improved access to affordable inputs
5. Access to arable land – soil fertility, maximal land
6. Extension sevices that reach the people and offer advice, information and more productive methods, marketing and alternative income generation activities
7. Improved access to storage and processing facilities

The PMA notes the absence of education from the list of priorities, but attributes its omission to the introduction of Universal Primary Education (UPE). A critical review of this list underlines the need and inevitability of some form of adult education, as is already being seen in the implementation of the National Agricultural Advisory Services (NAADS).

The NAADS has been created largely in response to area number six above. Currently, the NAADS secretariat is co-ordinating training and sensitisation in pilot districts and the issue of illiteracy has already started being raised by the district officials, who observe that much of the training will be irrelevant to many of the poor farmers who cannot read or write. In a Tororo Workshop on Integrating Gender into the NAADS programme, one of the respondents noted that women were bound to lose out since many village women could not even count money and depended on the goodwill of buyers not to cheat them.[10] Various district officials all over Uganda have also stated the need for imparting management skills to farmers if the NAADS objective of promoting a culture where farmers carry out "farming as a business" and not simply a means of subsistence is to be achieved.

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[9] Government of Uganda, The Plan for Modernisation of Agriculture (PMA), Kampala: Government Printer, 2000, p vii.

Since Uganda is primarily an agricultural country, most economic activities of women are in agriculture, and the PMA aims to mainstream gender in all agricultural activities and thereby effectively to involve men and women as equal partners at all levels in agricultural development. The mainstreaming of gender is perceived as important because women constitute the majority of small-scale farmers. It is also acknowledged that women and men have distinct roles and responsibilities that demand specific actions and incentives. The women of Uganda are anxiously hoping that the good intentions of this plan are not derailed at implementation stage.

Decentralisation

The process of decentralisation, begun in the early 1990s, aims to improve administrative performance, enhance transparency, and strengthen the accountability of government to the people. Decentralised structures have been designed to make government more sensitive to the needs of the people and have already brought radical changes to the functions of central government ministries.

However, the effectiveness of these structures is undermined by the lack of capacity within many local governments. For example, some positions such as the Sub-County Chief require various duties which call for further training above the required qualifications set by government. Another solution to this critical dilemma would be the arrangement of specialised (functional) literacy courses to ensure that the officials who are elected by the people remain in office and still discharge their duties efficiently and effectively. The main limitation would be financial since these officials face the risk of not being re-elected, meaning that others would have to be trained after every election.

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[10] CEEWA-U, Integrating Gender into the NAADS Programme, Report on a gender sensitization workshop, Tororo, July 2001.

Case Study

Impact of Adult Literacy on Sustainable Development

Katosi Women Fishing and Development Association is an association of rural women in Katosi who got together to improve their general socio-economic standards of living. By initiating and promoting women's income-generating activities through the provision of credit, some success has been achieved, but this is limited by the high illiteracy levels among the women.

For many of the women, the Association gave them their first opportunity to handle money or to run a business. Many of the initial businesses failed and the rate of default was high; this nearly brought about the collapse of the revolving loan fund. Members did not keep records and were not even aware of whether they were making profits or losses. The women of the Association, noting a need, sought help and received training in business management and book-keeping, as well as how to conduct feasibility studies.

A two-day training course was organised for the women, which helped them to better understand their businesses and how to run them. Some members even started new businesses after which general success was recorded in most of the businesses run by women in the Association. They were excited by their progress and have been requesting further training.

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Gender, Adult Education and Development

Although education plays an undeniable role in development, it cannot on its own create the desired changes in society due to the damaging effect of certain issues such as societal traditions and cultures on women's advancement. Below are some of the areas where adult education can make a significant impact and consquently contribute to sustainable development.

Adult education should, first of all, be community-oriented. The content of such education should involve life in its entirety, and try to impart to individuals and to the community all the skills needed to manage one's life. The success of some development programmes depends on how educated the target group is.

One such example is the area of rural micro-finance. Most of the micro-finance clients in Uganda are women, who are mainly semi-literate and illiterate. The reason for this state of affairs is that they have less wealth and productive assets than most of their male counterparts.

The case of the Katosi Women Fishing and Development Association shows that functional adult literacy, focused towards daily livelihood activities, can be interesting and beneficial and instil confidence in those who receive it. This is because functional adult literacy is usually premised on the fact that the learners have basic knowledge and simply need to acquire skills to help them do what they do more efficiently, as is the case with the Katosi Women Fishing and Development Association.

Adult education should be considered a process of learning throughout life, and not limited to specific periods. The system should be very flexible and the place of education should be where the need arises. Sometimes adult literacy must be gender-focused, as in the above case, since women are mostly involved in agricultural activities and yet have a need for functional literacy.

The biggest number of Ugandans who will need adult education in the near future will be women because of the hardships faced by girls in the formal education structure. Even with Universal Primary Education (UPE), which provides free government education for all children, girls' education is suffering. The Ugandan Government has emphasised the fact, and it is clearly articulated in the Constitution, that all children should be treated equally in access to resources. However, when mothers need somebody to care for younger children in the home while they are away in the gardens, girl children are often the first consideration, leading to distraction from studies and eventual drop out.

There are other reasons that may be advanced for focusing on women in development and some of them are as follows:

- Women tend to contribute a higher proportion of their income (94%) to family subsistence, holding back less for personal consumption.
- It is mothers' rather than fathers' incomes or food production that are more closely related to children's nutrition.
- Women are more responsible than men for the full range of reproductive activities.
- Women often give primacy to income-generating activities.
- With respect to labour, time budget studies invariably find that women work longer hours (due largely to the "double day" phenomenon, of performing first productive and then reproductive tasks).
- Various studies world-wide have shown women to be more responsive to loan repayment.

In addition to the above issues, and despite efforts to improve women's lives worldwide, recent statistics confirm the existence of growing numbers of female heads of household. Households headed by women are more likely to be poor than male-headed ones. This is due to the fact that they tend to have little by way of productive resources, such as land, coupled with a large number of dependents. There has been a notable increase in women-headed households in sub-Saharan Africa. In particular, rural women are becoming more responsible for household food security and children's welfare. Women head an estimated 45% of rural households in Kenya, 35% in Malawi, 30–40% in Zambia and 15% in Nigeria.

Circumventing Gender Bias through Superior Intellect?

An amusing, but telling, example of gender inequality and a form of empowerment in Uganda relates to the taboo prohibiting women from riding a two-wheeled bicycle. The reason for the taboo has to do with the belief that a woman who straddles a bicycle seat is somehow "compromised" and no longer a respectable woman. Rather than focus their energies exclusively on changing this perception, a group of women smallholder farmers designed a three-wheel bicycle that uses a bench seat rather than a conventional bicycle seat. As a result, women are able to benefit from the convenience and efficiency of a bicycle – or tricycle – and still avoid transgressing a local taboo.

In addition to acknowledging this as an innovative solution to a cultural problem, it should be noted that other creative features were also added to the bicycle's design, such as an umbrella to provide shade for the women and their children, and a large storage area for food and supplies.

Politics

The societal pressures of a patriarchal system keep women from political positions and sometimes from engaging in gainful employment. Women who toe the line, keeping within the traditional and cultural confines, are rewarded while those who break out of the mould are punished in various ways. Some of the rewards and punishments are overt while others are subtle. For example, it is not uncommon for men to abandon their wives if they venture into politics.

On another level, the media are relatively intolerant of any mistakes made by women politicians and will waste no time in ridiculing them. The same media will rarely find time to report on issues where women make significant political contributions and would much rather focus on their personal lives.

Women's role in politics recently received a boost from women activists who started organising leadership training events for women before different levels of elections. This may be responsible for the slight increase in the number of women in the Seventh Parliament of Uganda.

Micro-finance

Micro-finance has been cited to be necessary in development in both rural and urban areas. The biggest clients of micro-finance institutions are women, who rarely have business skills to make significant investments, as do their male counterparts who may quickly overtake the women in terms of clientele.

Formal Employment Sector

Even within the formal sector, women lag behind men and often earn less money for similar Work. This still persists even though the Government of Uganda has put up a half-hearted campaign to stop such practices. Many women fear that reporting such cases will lead to the loss of their jobs, which would make their lives even harder. There is a need for the development of stratigic guidelines for gender balance in staff recruitment, training, and promotion for both women and men employees.

Women need to be targeted in areas of training and capacity building to help them improve their marketability in the job market. The challenge, however, is much bigger and the success that training and capacity building can achieve is limited given the reality of the "glass ceiling". Often women receive promotions up to a certain level, but this tends to stop at lower or middle management and stays there – having reached the unspoken limit for female employees in a majority of companies. The problem with the "glass ceiling" phenomenon is that it is hard to prove as most employers argue that promotion is given on merit.

Adult Education and Empowerment

Education is a very powerful tool of liberation. Educated people can analyse situations, define strategies, draw up programmes of action, and opt for a better deal on any socio-economic and indeed political matter. There have been some arguments which assert that the leading elite stands to lose by educating the ignorant masses, who would then be more critical of and possibly overthrow self-gratifying regimes. This argument was highlighted during the most recent presidential elections when the rural masses, who are largely illiterate, voted for the incumbent president. The people in urban areas overwhelmingly voted for the opposition leader.

The experiences of most East Asian countries indicate that one of the important aspects that have boosted their high economic growth rates, has been the implementation of policies that focus on more equitable human recource development.

Based on such assumptions, then, and the obvious need, it is recommended that African governments in the region, as a matter of critical concern, mainstream gender in rural development and agricultural planning systems. Further research should be undertaken into the root causes of inequality, which should then be tackled in order to ensure sustainable development. African governments should then adopt and implement strategic guidelines for gender balance in staff recruitment, training and promotion in the agricultural sector.

It can be demonstrated that gender disaggregated socio-economic data in all countries in the region informs the planning process in agricultural projects. In this regard, it would be helpful to establish a gender disaggregated socio-economic data base system that can produce adequate, relevant and accurate information to address gender issues in development planning.

It is critical that gender imbalances that may affect productivity are highlighted and addressed. Moreover, governments in the region should boost rural finance programmes by training their members to ensure that maximal use of credit is made. Studies show that women use credit as effectively as men when it is available. Moreover, their repayment rates are generally much higher.

At the same time, disadvantaged communities should be involved in the planning, implementation and monitoring of the programmes aimed at combating poverty in their lives.

Conclusion

Although the challenge is huge, there are positive indications of political will among African leaders. Africa is experiencing an increase in leaders with a vision of sustainable development, with a focus on rural communities. The real ofjective of development should be to create an enabling environment for all people to use the available methods for their well-being.

To think that education is the cure for all the development problems faced by Africa would be utopian but we must acknowledge the empowerment and enlightenment that can be gained from relevant and people-focused education. Education gives people choices and thus power – and educated people will tend to reject detrimental policies and make informed choices of leaders and development patterns.

The Kenya Adult Education Association KAEA has published the following new Post-Literacy-Materials in the series "Knowledge an Information Management"

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2. A Response to the Need for Continuing Education
3. Developing a National Curriculum
4. Kenya-Post-Literacy Project
5. Post-Literacy Materials
6. Implications for Post-Literacy – Curriculum Report
7. Kenya Post-Literacy Project Handbook
8. The Role of the Media in Promoting Post-Literacy
9. The Role of the Media in Expanding Access to Basic and Lifelong Education

Kenya Post-Literacy Project Implications for Post-Literacy Curriculum Development
The Role of the Media in Promoting Post-Literacy
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The purpose of this paper is to report on the challenge posed to adult education and skills training by the large numbers employed in small and medium-sized enterprises, SMEs, in Chile, by reference to the experience of a particular economic niche in one region of the country. Since the 1990s, Chile has invested large sums in education. But today's adult workers need new learning opportunities to make up for the education that they missed at school because of the lack of investment in education by the Military Government in the years 1973-1989. Both SMEs and so-called micro enterprises, which employ fewer than 5 workers and have sales not exceeding 50 thousand US dollars a year, are the major source of employment in developing countries. Despite the low productivity in such enterprises, the people employed in them have little opportunity for education or training. Besides reviewing the challenge posed to adult education in the country, this article describes an example of SME training in La Araucanía Region in Chile, where the greatest percentage of the indigenous population is concentrated and which has the highest indices of poverty despite the richness of its natural and cultural resources. The enterprises in question are concerned with tourism, which is a developing industry given the decline in agricultural employment. The methodology used emphasises management training and the teaching of relevant knowledge. Oscar Corvalán V. is Director of ITUR (Instituto Eurochileno de Turismo), Universidad de La Frontera, Pucón, Chile.

Oscar Corvalán V.

Adult Education and Skills Training for Small and Medium-sized Enterprises in the Tourist Industry in one Region of Chile

1. A Brief Outline of Adult Education in Chile

Education for young people and adults has the complex task of responding to the needs of a heterogeneous population. Hence, teaching approaches have to take this diversity into account. The potential demand is huge. According to the 1992 census, 4,527,148 persons aged 15 years and over have 8 years of education or less, and 1,995,578 have between 9 and 11 years of formal schooling. That means that **70% of the population aged 15 years and over have not completed basic and secondary education**.

However, the actual demand for adult education (AE) is low, only reaching 155,930 students in 1998, most of whom were under 25 years of age. The information available suggests that 77% of those gaining qualifications via this route were young people aged between 15 and 24 years who were looking for means of easing their integration into society and the labour force. In fact 64,500 persons aged 14-17 years drop out of the formal school system each year, 72% of whom belong to the poorest quintile of Chilean society.

Adult education in Chile currently provides a range of options for starting and/or completing school education. It offers a second chance to those young people and adults who were not able to complete their formal education for various reasons. Adult education is a way of acquiring and strengthening the knowledge and skills needed to respond better to the requirements of today's world, both at work and in everyday life. Anyone aged 15 years or over may take advantage of it.

Most of the establishments providing adult education belong to local authorities and are free. There are around 1200 establishments offering this type of education in the country. Eighty of them, known as Integrated Adult Education Centres (CEIAs), run classes solely for young people and adults in three shifts: morning, afternoon and evening. The others are conventional schools that provide "third shifts" in the evenings for young people and adults. Special, more flexible programmes have also been developed recently alongside traditional adult education.

Basic education in Chile lasts 8 years. It is followed by secondary education (*Educación Media*), which lasts 4 years, the first two of which are common before there is a split between Scientific Humanistic Education on the one side, and Technical Vocational Education on the other. Young people and adults may complete basic and/or secondary education, or they may join Special Basic and Secondary Education Programmes for Young People and Adults.

Scientific and Humanistic Basic and Secondary Education	Vocationally oriented Basic and Secondary Education	Special Compensatory Basic and Secondary Education Programmes for Young People and Adults
Basic education for young people and adults lasts three years and comprises three levels: • Level 1 – Basic yrs 1-4 • Level 2 – Basic yrs 5-6 • Level 3 – Basic yrs 7-8 There are two forms of secondary education for young people and adults, one lasting four years and one, two years.	**Adult Basic Education (ABE)** and **Elementary Technical Adult Education** make it possible to complete studies up to Secondary Year 2 while taking vocational training at the same time. The curriculum contains three areas: the common or general education area, the technical or skills area (e.g. courses in mechanics, carpentry or tailoring) and the additional activities or personal development area (craft workshops, drama, aerobics, folklore, etc.). **Technical Vocational Adult Secondary Education** offers the two 2-year cycles of adult secondary education at the same time as a secondary vocational qualification (e.g. secretarial, executive or bookkeeping skills).	The **Special Compensatory Basic and Secondary Programme** is aimed at young people and adults who are working and want to complete their basic or secondary education through a flexible system, without fixed hours and with a content that matches their educational needs. The **Compensatory Work Skills Programme**, jointly run by the Ministry of Education, the Ministry of Labour and the Solidarity and Social Investment Fund (FOSIS), provides an opportunity to complete basic and secondary education for people aged between 18 and 40 years who are unemployed.

In line with the Educational Reform launched in the 1990s, adult education has recently initiated a process of curriculum revision. The AE reform seeks to create a curriculum that will provide a solid basic education for adults as a foundation for the acquisition of specific knowledge and skills that meet the requirements of increasingly complex, globalized living conditions.

This year, 2002, the Government of Chile launched the Lifelong Education and Skills Programme "Chile Learns More", the purpose of which is to provide opportunities to catch up with education and to improve the skills of low-paid workers and young Chileans.[1] The aim of the programme "Chile Learns More" is to improve Chileans' current levels of education, skills and employability. As has been pointed out, about 70% of people aged 15 years and over in Chile have not completed basic or secondary education, although 40% of the population are economically active.

Similarly, the programme sets out to improve secondary and higher technical education, as a basis for enhancing human resources and productive development. The aim is to create a national Lifelong Education and Skills Training System which will meet the country's social, cultural and economic needs in the context of globalization.

The following goals have been set for 2002:

- At least 8000 persons completing second chance basic or secondary education
- Model projects in Regions V, VIII and the Metropolitan Region linking work skills training and second chance education, allowing people to catch up with school education at the same time as they receive training in work skills
- A pilot distance education project to develop a new methodology using information technologies for second chance education: 1000 people are expected to use this method
- Four model projects linking technical training, involving technical vocational schools, technical training centres, vocational insti-

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[1] The programme has a budget of 150 million dollars, 75 of which are a World Bank loan. The remainder is financed from taxation and private sources.

tutes, universities and the productive sector, covering 3240 students and directly related to regional economic development (Regions III, VIII, IX and X)

- A pilot experiment certificating employability skills (900 persons) in tourism and in gas and electricity (1600 workers)
- A pilot project addressed to 200 technical skills organizations to improve skills provision based on work skills
- Design of a public information system about the labour market and training provision, and creation of a programme website
- Activities for SMEs to promote use of tax relief for work skills programmes and second chance education for their workers

The target groups to benefit from these initiatives are: a) low-skilled workers and job-seekers who need to improve their levels of literacy, academic education and work skills; b) young people who need to find a job with suitable technical training; and c) workers in employment who need to upgrade their technical training.

2. Description of Chilean SMEs

The main indicators used in Chile to define small and medium-sized enterprises are: i) number of workers, ii) capital invested, iii) monthly or annual sales; and indicators of relations with the rest of the economy, such as: a) access to formal or bank credit, b) use of major industry technologies and c) access to markets outside the locality or the country.

Various typologies have been devised around the SME performance indicators, generally based on sales turnover, given the strict control exercised in Chile by the Internal Taxation Service. According to the definition of the Production Promotion Corporation (*Corporación de Fomento de la Producción*, CORFO), micro enterprises are those with sales of under US$50,000 per year, small enterprises have sales between that figure and US$250,000 per year, and medium-sized enterprises are those managing to achieve sales of up to one million dollars per year.

Table 1: Distribution of employment (in thousands of workers) in Chile, by size of enterprise

	No. workers	In %	Cumulative %
Micro enterprises (1-4)	2,024	38.8	38.8
Small enterprises (5-49)	1,836	35.2	74.1
Medium enterprises (50-199)	653	12.5	85.6
Large enterprises (200 or more)	505	9.7	96.3
No information	194	3.7	100
Total	**5,212**	**100.0**	

Source: CASEN 96

Micro enterprises together with small enterprises provide 74% of the total number of jobs in Chile. Hence the importance of considering the level of education and skills of their workers. Both categories provide work for nearly 4 million workers throughout the country, while large enterprises provide employment for just over half a million workers.

Micro enterprises are strongly represented in all fields of economic activity in the country, but almost half of them comprise self-employed workers concentrated in the retail sector, perhaps with two or three employees, selling articles from larger enterprises. In second place are micro and small enterprises in the agricultural sector, and these are followed by transport and personal services; catering comes next, and then micro and small industrial enterprises.

Table 3 shows the regional distribution of enterprises by size. In 1997 there was a total of 432,431 micro enterprises and 78,805 small enterprises in the country. Of that total, there were 24,723 micro enterprises and 3,545 small enterprises in Region IX, La Araucanía, accounting for approximately 5% of the overall total in the country.

Table 2: Number of enterprises by economic sector and size Chile 1997

SECTOR	MICRO	SMALL	MEDIUM	SMEs	LARGE	TOTAL
Agricultural production	54,174	8,150	522	8,672	121	62,967
Agric. services and hunting	1,444	430	49	479	18	1,941
Forestry	2,380	847	118	965	41	3,386
Fishing	1,223	338	89	427	74	1,724
Mining, oil and quarrying	966	396	80	476	97	1,539
Manufacturing industry	26,605	9,650	1,927	11,577	1,211	39,393
Electricity, gas, water	530	88	28	116	72	718
Construction	15,407	5,509	1,109	6,618	587	22,612
Retail	179,320	28,125	4,337	32,462	1,765	213,547
Catering	22,355	3,184	296	3,480	62	25,897
Transport	33,727	7,202	754	7,956	234	41,917
Financial services	7,329	2,615	341	2,956	166	10,451
Technical and prof. services	21,954	5,913	741	6,654	230	28,838
State social and institutional servs.	4,830	858	120	978	49	5,857
Entertainment	3,640	568	83	651	26	4,317
Personal and domestic services	33,407	3,457	169	3,626	41	37,074
Other activities	18,347	1,343	92	1,435	15	19,797
No information	4,793	132	15	147	5	4,945
TOTAL	432,431	78,805	10,870	89,675	4,814	526,920

Source: CORFO

The importance of micro and small enterprises in the country is such that no adult education or vocational training programme can ignore them, especially as it is the skills required to prosper in them which most workers need. Thus any strategy to improve the competitiveness of the country, to modernize labour relations or to increase the productivity of the labour force must necessarily concern itself with raising adults' levels of education and improving the skills of workers

Table 3: Number of enterprises by size and region Chile 1997

REGION	MICRO	SMALL	MEDIUM	SMEs	LARGE	TOTAL
I Tarapacá	14,776	1,834	213	2,047	67	16,890
II Antofagasta	12,650	2,291	273	2,564	103	15,317
III Atacama	7,619	1,142	108	1,250	33	8,902
IV Coquimbo	17,647	2,373	236	2,609	70	20,326
V Valparaíso	43,528	7,343	793	8,136	245	51,909
VI O'Higgins	23,864	3,582	346	3,928	91	27,883
VII El Maule	35,250	3,996	376	4,372	116	39,738
VIII El Biobío	48,672	7,394	811	8,205	254	57,131
IX La Araucanía	24,723	3,545	333	3,878	90	28,691
X Los Lagos	31,447	5,095	450	5,545	197	37,189
XI Aysén	3,256	439	47	486	15	3,757
XII Magallanes	5,014	1,032	130	1,162	28	6,204
Metropolitan Region	150,001	38,464	6,734	45,198	3,500	198,699
No information	13,984	275	20	295	5	14,284
TOTAL	432,431	78,805	10,870	89,765	4,814	526,920

Source: CORFO

in small enterprises.[2] In most developing countries, large and small enterprises are two different worlds that do not mix, despite the interests that they have in common. If the proprietors of small enterprises are successful, this means that more people will: i) provide products and services for local markets, ii) buy and exchange products and services at a business level, iii) be better educated and able to work more efficiently, iv) develop enterprises that buy products and technologies locally, encouraging cooperation between businesses, v) take on responsibilities and succeed in acquiring property, and vi) create a more stable political and social environment through their work.[3]

With the aim of encouraging the development of small enterprises, the Production Promotion Corporation, CORFO, and the Technical Cooperation Service, SERCOTEC, developed a series of programmes that were strengthened in the 1990s. The first of these bodies concentrated on small and medium-sized enterprises, providing development projects, PROFOS, to foster collaboration and skills for managers of small and medium-sized enterprises. SERCOTEC, on the other hand, focused on micro enterprises, supporting them with access to credit and new markets, as well as with skills training and the development of sales strategies.

Besides skills training programmes for the managers and workers of small enterprises, other schemes have been run in Chile: a) technical assistance and development of "clusters", by type of product or service provided, b) credit and access to capital networks, c) sales promotion, and vertical integration to facilitate access to markets, and d) development of entrepreneurial skills.

Although the incomplete data that are available do not make it possible to calculate the cost-effectiveness of these schemes, it is possible to draw some useful lessons for training policies. First, it is clear that the issue of collaboration between small enterprises is crucial if they are to gain access to new customers and to credit. Since this requires a change to the individualistic culture of small entrepreneurs, education and skills training are indispensable. Secondly, it is established that education and skills training for current and future workers in small enterprises cannot be provided in isolation from other support programmes such as technical assistance, sales development and marketing. Furthermore, the experience of programmes providing support for SMEs clearly demonstrates that it is necessary to apply a new concept of adult education emphasising training and the development of vocational and other skills. In reality, the range of skills required in a small enterprise is much greater than what is needed in a large or moderately large enterprise.

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[2] Corvalán V., Oscar and Peluffo A., M.B. Formación profesional y sector informal urbano en el Cono Sur, in Manfred Wallenborn (ed.) Sistemas de Formacón Profesional. Mannheim, ZGB,1997

[3] Brugger et al. Forjadores de Porvenir: la pequeña empresa en el desarrollo. 1994:26-7.

On the other hand, international experience of support for small enterprises, either via the organization of so-called "Industrial Districts" in Denmark and Italy, or via Local Support Centres in the United States, suggests that a genuine change of culture has to come about if micro entrepreneurs, small entrepreneurs and their workers are to work collaboratively. This cannot be achieved without adult education and skills training programmes clearly setting out the skills that each person needs to acquire.

The globalization and structural changes to their economies from which Latin American countries are suffering also require well thought-out programmes of lifelong education and skills development, without which the vast majority of workers will remain on the margins of social and technological change and will be forced into underemployment or unemployment.

The effects of international integration on SMEs clearly suggest that their workers cannot do without a major updating of their skills and the development of career projects that make best use of the few opportunities that globalization offers them. Small enterprises, which used to produce for the local market, are now being transformed into suppliers of parts for articles produced thousands of kilometres away, as a result of further changes in world trade and the new role required of SMEs.

The opportunities and problems of the subcontracting work offered by some large companies also call for considerable retraining of workers and the learning of new work skills.

3. Small Enterprises Working in Tourism

The case of the small enterprises associated with tourism reveals features that distinguish these SMEs from others. Although they do not have to work with a large company as part of a chain, or export goods to the standards required by the demanding markets of the industrialized countries, the service quality demanded by international tourists means that small enterprises working in tourism need considerable ongoing education and skills training.

The tourist system is in fact made up of the supply of and consumer demand for tourist goods and services within a specific geographical area, under the influence of the tourist market operators facilitating interaction between supply and demand. The latter include travel agencies and transport operators. But typical tourism activities also include micro and small enterprises providing accommodation and catering (restaurants), leisure and recreation, cultural and sporting activities, retail trade and crafts. Moreover, wherever the tourist industry flourishes, the building industry is also busy since each of the tourist services needs buildings, infrastructure and facilities. The various means of transport require repair and maintenance services. At the local level, accommodation services are at the core of tourist services, providing hotels, motels, camp sites, resorts, guest houses, cabins and serviced apartments. All of these tourist services are based ultimately on natural resources, such as sites of natural beauty, and on cultural sites created by human ingenuity.[4]

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[4] OMT-WTO. Introducción al Turismo. OMT. Madrid. 1998:50ff.

Small enterprises can enter or expand within the tourist industry provided that they offer services of good quality. New trends in international tourism enable interested travellers from distant countries to have access to local natural and cultural resources, which are converted into tourist products and competitive tourist destinations. Mass tourism has given way to adventure tourism, ecotourism and special interest tourism.

The development of world tourism is marked by a greater variety of destinations and an increase in adventure travel, which calls for such features as: different surroundings, untouched nature, exercise, guidance, and new natural and cultural resources, all in a safe environment. In this situation, total quality is a management tool that needs to be learnt.[5]

In the light of these changes, some regional universities, such as the Universidad de La Frontera, situated in La Araucanía Region, some 800 kilometres south of the national capital, have recently launched training and updating courses at all levels in fields related to the development of the regional tourist industry.

As part of this process, a course was provided in tourist business management for a sample of enterprises from the pre-Andean lakes region. This taught a great deal about the potential social, economic and personal development of those connected with the tourist industry.

A wide variety of enterprises provide services for tourists. Hence, when groups of small enterprises from the communes of Pucón and Villarrica were invited to take part in the skills development and updating programme for tourist businesses, those attending came from the following sectors: agricultural production of foodstuffs without fertilizers, repair of transport equipment, real estate, craftwork, retail trade, hotels, communication, construction, information technologies, food products, health, personal services, catering and transport.

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[5] Ibid. p. 387.

Table 4: Sample of micro enterprises taking part in tourism management courses, 2002 Communes of Pucón and Villarrica, Chile

Table 4. Sample of enterprises	Participants.	
Type of business	**Frequency**	**Sectors**
Tourist agency	4	Agriculture
Agriculture	3	
Agro-camping	2	
Motor cycle hire, machinery	2	Repair
Real estate, brokerage	3	Real estate
Crafts	5	Crafts
Plant and flower crafts	2	
Automotive workshop	5	Repair
Bazaar	6	Retail trade
Cabins	18	Accommodation
Lodgings	2	
Camping	6	
Hotel	6	
Beauty centre	1	Personal servs.
Telephone call centre	3	Communication
Furniture	4	Construction
Stone-laying	1	
Contractor	3	
Timber	3	
Electrician	1	
Metal structures	1	
Door and window manufacture	2	
Computing	1	Info. technology
Photographer	2	Communication
Design and publicity	2	
Distrib. of food products	12	Food
Supermarket	2	
Chocolate factory	1	
Homeopathy	1	Health
Printing	1	Services
Laundry	1	
Bookshop	1	
Restaurant	7	Catering
Taxis and transport	5	Transport
Total	**119**	

Source: Itur, 2002

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All of them shared the need to redefine their businesses in the light of the decline in agricultural production, pursuing the growth prospects offered by the tourist industry.

The content of a theoretical and practical programme lasting some 100 hours was organized in thematic units looking at: a) tourism as an economic activity, including the tourist system and the role of public and private bodies involved in tourism, b) management of small enterprises and the administrative cycle, including the drafting of budgets and programmes, c) design and marketing of tourist products, including pricing and marketing strategies, d) finance as applied to micro enterprises, and e) preparation and presentation of local tourism development projects.

In addition to the skills relating to the various aspects of managing small enterprises, micro entrepreneurs gained an awareness of the need to band together and organize in order to develop new offers of tourist services and to reach new customers and markets.

At the same time, they were able to appreciate the dangers posed to the development of local tourism by the inorganic and disorderly growth of cities, and by contamination of the water supply and the indiscriminate use of forests as a source of energy for heating.

The issue of coordination between public sector and private sector organizations emerged clearly in the discussions and the practical work associated with the skills training course, as a result of which a new dialogue began between the local and regional authorities and the groups of small entrepreneurs formed in each commune.

Conclusion

Years ago, adult education and skills training for workers ceased to be a mere adjunct to the school system and transformed themselves into a complex area of knowledge and educational practice that calls for multidiciplinary learning and specialists in education and the world of work.

There is a need to define the skills required to function effectively in the complex world of products and services provided by small enterprises, where micro entrepreneurs must simultaneously study the market, design the product, sell it, draw up budgets, seek funding, deal with local and national authorities, attend to customers and check on the quality of every operation.

The mystique prevalent among those running micro and small enterprises often leads them to work ineffectually. Lack of methods and techniques to calculate the costs of their products and services sometimes means that they set prices according to demand or the prices charged by competitors. Frequently, self-employed micro entrepreneurs are not covered by national social security legislation and, together with their employees, have problems gaining access to health services and credit, with the result that small entrepreneurs systematically pay a proportionately higher price than large companies.

On the other hand, the education and training required mean that arrangements have to be made to increase mobility of labour and to provide lifelong education for workers in small enterprises. The changes which Latin American countries are experiencing as a result of globalization and the integration of international markets require governments to set up national systems of training with the relevant mechanisms for certification and quality control of learning.

While progress has been made in defining technical and technological skills, there is still a considerable way to go in defining and measuring communication skills, cultural skills and general education skills, which form the basis for the development of constantly changing technical skills.

Lifelong education and skills training for current and future workers in small enterprises, who account for three quarters of the workers in the country, will require educators to work alongside the social scientists who are monitoring developments in the economy and practices in the world of work.

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This research study sought to investigate the training orientation given to apprentices; common training techniques employed by the master-craftsmen; and how the apprentices are evaluated to ascertain their mastery. A questionnaire made up of 25 items was used to gather data for the study. Master craftsmen, journeymen and apprentice from two neighbouring states (Delta and Edo) were used for this study. Among the findings of this study are that there is no formal curriculum in use for training, and customers help to determine the mastery of apprentices. Dr Raymond Uwameiye works at the Department of Vocational and Technical Education, and Dr Ede O. S. Iyamu at the Faculty of Education, of the University of Benin.

Raymond Uwameiye/ Ede O. S Iyamu

Training Methodology Used by the Nigerian Indigenous Apprenticeship System

Background and Problem

Apprenticeship is a contractual agreement undertaken by the master-craftsman and the apprentice through which the apprentice is trained

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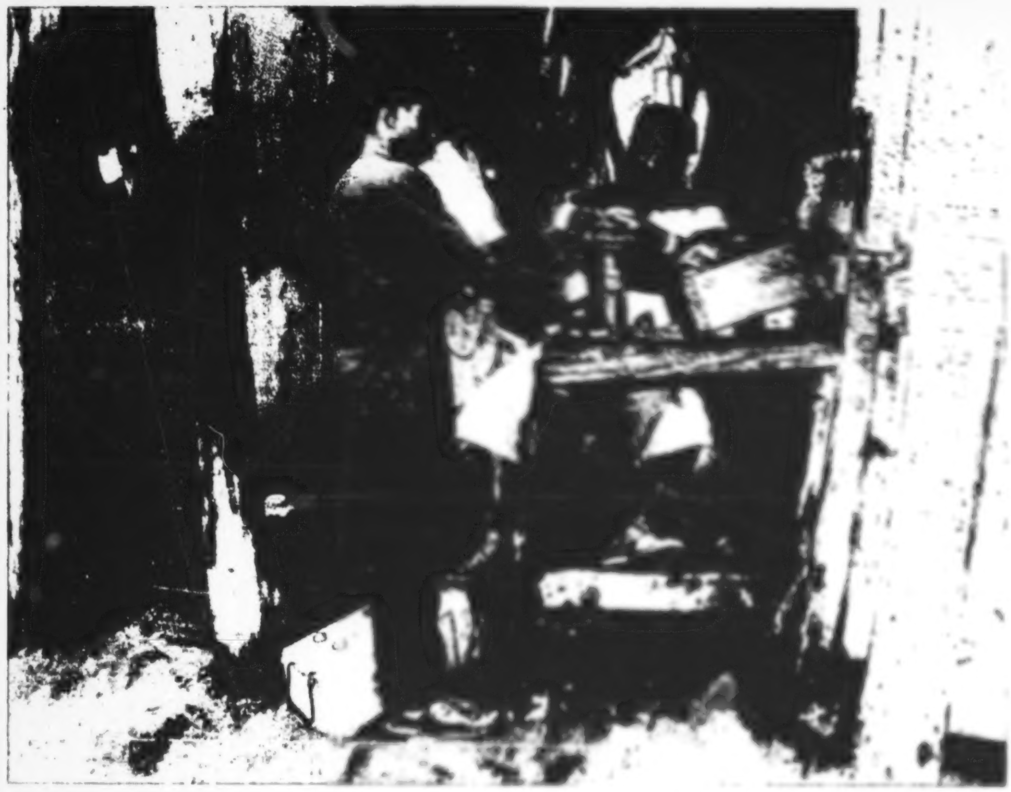
for a prescribed work process through practical experience under the supervision of the master-craftsman. It is a form of workplace learning, which enables the apprentice to have on-the-job training.

In Nigeria and all over Africa, apprenticeship has been an age-long method used in training young people in trades and crafts, agriculture, business, and catering. During the pre-colonial days, apprenticeship was the mode of training. It is a common feature of the traditional setting to see people engage in a vocation such as farming, fishing, hunting, carving, carpentry, sculpting, painting, building, decorating, smithing, catering, boat-making, mat-making, dyeing and so on. The apprenticeship system was an institution that was jealously guarded by customs, lineage and rituals. Every male born into a family was expected to learn his patrilineal craft, and it was easy to identify a young male child as a member of a lineage found to be proficient in the lineage craft.

During the colonial era, the main interest of the missionary was evangelization of the Africans. In order to achieve this purpose, it was thought that literary education was deemed adequate for the purpose since it was least expensive, and equipment for technical and agricultural training was costly in men and money (Coleman, 1963). However Fafunwa (1974) noted that "some of the mission schools included bricklaying, farming and carpentry as part of their curriculum, but these skills were not seriously regarded by pupils and parents as an integral part of western education".

With the introduction of the 6.3.3.4 system of education in 1982, literary education was de-emphasized. Vocational education was given pride of place in the schools' curriculum. While the number of schools was increasing, roadside apprenticeship, which provides opportunities for training adolescents who dropped out of schools, and those who cannot afford the secondary school fees, increased. Roadside apprenticeship is characterized by a contract agreement between a wayside craftsman (e.g. motor mechanic, vulcanizer, auto-electrician, wheel alignment and balancing practitioner) and his ap-



While the-auto electrician couples back the kick-starter, the apprentices assist him
Photo: Raymond Uwameiye

prentice. In the contract a fixed fee is made payable by the apprentice to the master, and in return, the apprentice is attached to the master's shop for a stipulated training period. The set-up for a training workshop is made up of the master (skilled), journeyman (semi-skilled), and the apprentice (unskilled). The master has full control of the training without any input from the government. Although the Federal Republic of Nigeria (1981), states that "the question of accreditation for roadside mechanics and others who complete training programmes through non-formal education will be undertaken by the National Board for Technical Education (NBTE)", government has not accredited any roadside workshop for such training for almost twenty years, since the policy was promulgated. This has left much to be desired in roadside apprenticeship, hence this study to investigate the methods used by roadside apprenticeship in training. However,

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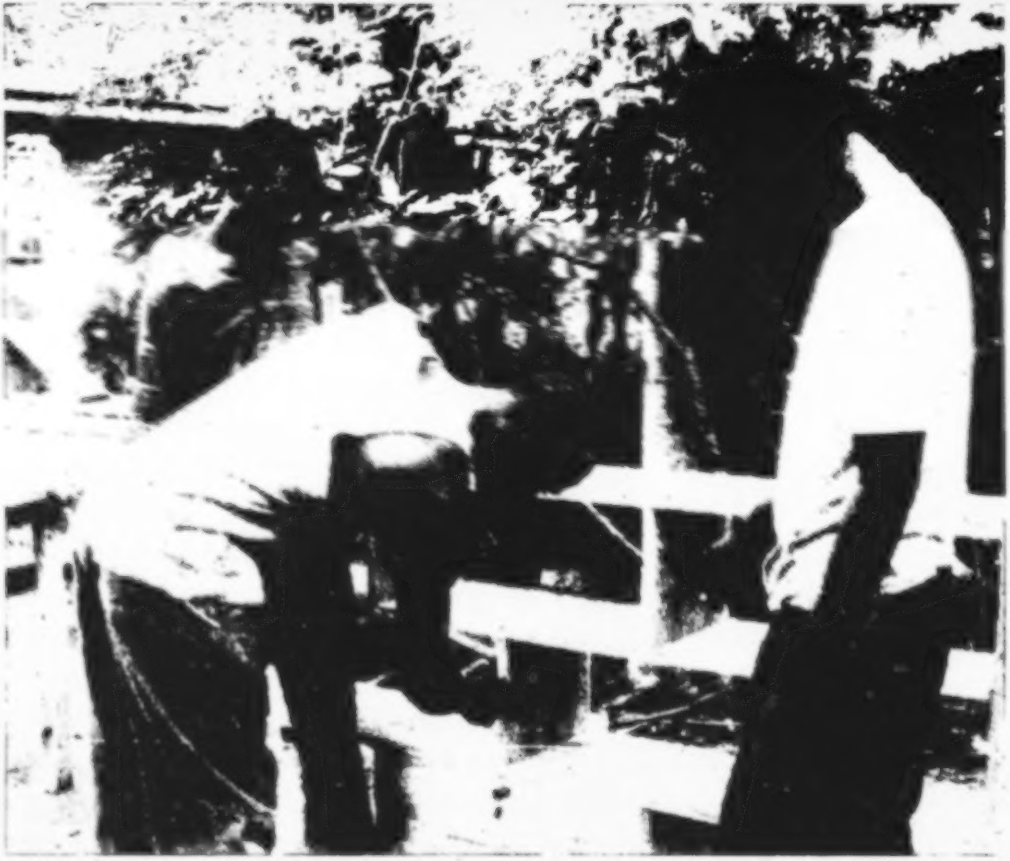
roadside apprenticeship has contributed immensely to the growth of the Nigerian economy. The informal vocational training system has been serving as an indispensable complement since enormous demands have been placed on it.

For ages, roadside small-scale enterprises have provided opportunities for training young apprentices in Nigeria. In most urban areas, roadside workshops such as tailoring institutes and mechanics' workshops are common sites in every street. The numerous indigenous small-scale establishments in urban cities are due to rural-urban migration of young people looking for employment believed to be in abundance in urban areas. Such unrealistic beliefs soon come to light, as the government establishments are unable to absorb the migrants. The young migrants soon find it convenient to attach themselves to apprenticeship workshops to acquire skills. Realizing the contributions of these roadside small-scale enterprises to the national economy, and the needs of the young school leavers being trained in these set–ups, the Federal Republic of Nigeria (1981) envisaged that these roadside apprenticeship centres would be accredited for training by the National Board for Technical Education (NBTE): a policy that has never seen the light of the day. The problem in implementing this policy is that it will be very difficult to have any centre accredited for the following reasons:

1. The educational level of master-craftsman and journeymen is very low. In fact the majority of them are primary school-leaving certificate holders.
2. Most workshops do not have the required tools and machines. They are able to carry out repairs due to adaptations to tools and machinery.
3. The rudiments of teaching are essentially lacking in these master-craftsmen.

In order to provide relevant practical vocational training, the Industrial Training Fund (ITF) in consultation with other bodies envisaged setting up a National Apprenticeship Scheme. It was envisaged under this scheme that vocational training centres would be established to



The furniture-maker carries out finishing on a shelf while the apprentice watches closely *Photo: Raymond Uwameiye*

provide a base and skill up-grading training for both minors (14 years) and employed adults (Federal Ministry of National Planning, 1975). Among the objectives of this programme are:

a) to provide trainers with occupational skills and technical knowledge
b) to foster the necessary work attitude and proper discipline among trainees and develop them as competent skilled workers and
c) to insist in the trainees a sense of pride in their trades

It was envisaged that only five vocational training centres would be built before 1985 throughout the country. These vocational training centres were to be models. It seemed that these centres were too few to be meaningful for the number of intending students.

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There seem to be numerous lapses in the indigenous roadside apprenticeship, which forms the focus of this study. However, these lapses cannot undermine the importance of apprenticeship to national economy. Therefore, the need to reform roadside apprenticeship along the lines of modern apprenticeship, which combines the learning of theory and practice, cannot be over-emphasized. The nature of the roadside indigenous apprenticeship, which is unorganized and unstructured, calls for reform. A reform in this direction calls for high training on the part of the master craftsman to meet industrial needs, and deliver quality vocational education courses which are based on industry competency standards and involve workplace learning (Velde et al.,1999).

Research Questions

1. What is the training orientation given to the apprentice by the roadside trades and crafts?.
2. What are the common training techniques employed by the master-craftsmen in imparting skills to apprentices?
3. How are the apprentices evaluated to ascertain their mastery of the trade?

Methodology

Population for this Study

The population for this study comprised master-craftsmen, journeymen and apprentices from mid-western Nigeria. Mid-western Nigeria is made up of two states, Edo and Delta. These states were at one time only one state (Bendel), until 1991 when it was divided into the two states. These states are dominated by Christians and have many things in common.

Sample for This Study

In each of the two states (Delta and Edo), one urban city (Warri in Delta State; and Benin City in Edo State) was selected for this study. The choice of these towns was based on their cosmopolitan nature,

A auto-mechanic carrying out repairs in the car while the apprentices watches closely *Photo: Raymond Uwameiye*

which has made them very attractive to young people migrating into them. A list of trades and crafts that were registered with the Ministry of Trades and Labour in the respective states was obtained from the ministry. The population was stratified to unique trades. Overall, 16 trades and crafts were used for the study. In each trade, 20 master-craftsmen, 20 journeymen and 20 apprentices were randomly sampled through the use of a random number system. Overall 320 master-craftsmen, 320 journeymen and 320 apprentices were used for the study.

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A auto-mechanic carrying out repairs in the car while the apprentices watches closely *Photo: Raymond Uwameiye*

Instrument for this Study

The instrument used in the study for data gathering was the modified Ugonabo and Ogwo (1991). The questionnaire was made up of 25 questions.

The sample used has very low educational attainment; most of the master-craftsmen were primary school-leaving certificate and standard six certificate holders. Experts in vocational education from the University of Benin helped in validating the questionnaires. The experts added more questions and restructured some of the questions.

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Respondents were expected to react to the questionnaire by either agreeing or disagreeing with them. Whereas '4' represented a strong agreement, '1' represented a strong disagreement. The researcher trained 50 research assistants who were used in administering the questions. Where a respondent could not read or write the researcher or research assistant interpreted the questions and helped to fill in their responses on the questionnaire.

Summary of Findings

1. Training orientation

   Training orientation given to apprentices includes:
   a) Introduction to names and uses of tools found in each trade
   b) Parts of machines in use and their functions
   c) Code of conduct (highly emphasized)
   d) Good customer relationship
   e) Training period of between 3 and 5 years
2. Training method
   a) In the training of apprentices, there is no formal curriculum in use. Jobs at hand/problems/faults at the material time determine the content of material taught.
   b) Learning through observation is the major method adopted in the learning process;
   c) Principles of operations are not explained.
   d) Safety in workshops is taught during orientation.
3. Evaluation
   a) Customers determine the mastery of apprentices through consistent approval of services rendered by the apprentices.
   b) Consistency in successful diagnosis of faults/demonstration of skills shows mastery.
   c) The expiration of the contract agreement does not mean that the apprentice is qualified.

Discussion

The list above indicates that the training orientation given to apprentices includes: (1) the introduction to names and use of tools found in the trades and (2) parts of machines in use and their functions. Whereas this seems good, the teaching of these items to the apprentice is carried out only when the job or jobs entailing them is at hand. The list also shows that the code of conduct, which is highly emphasized in the early part of the training, includes no fighting, no stealing, and respect for customers. In addition, the list indicates that the period of training varies between three and five years. It is also revealed that the dropout rate among apprentices is high, which results in the termination of the contract agreement.

The list also reveals that indigenous apprenticeship as currently practiced, lacks formal orientation. The respondents agree that there is no curriculum used in the teaching of apprentices; what is taught is dependent on jobs available and faults or problems at hand. There does not seem to be any structure and organisation of content in this approach; what is taught seems arbitrary and haphazard. The mode of instruction is observation, practice, and explanation (if questions are asked). This is learning by imitation. It is also shown that teaching of theoretical principles is non-existent. The mode of training does not prepare apprentices for opportunities to judge situations based on available theoretical principles. The apprentice is trained to be like his master. Among the defects of the local apprenticeship system are lack of any theoretical base for the skill acquired, the haphazard nature of the method of instruction and evaluation, and the possibility of poor skill formation under ill-equipped craftsmen. Considering these lapses, little or no learning may be expected from roadside apprenticeship. Lewis and Greene (1982) state *"that learning is not an innate and largely fixed mental ability related to levels of intelligence, but a series of skills that have been mastered and perfected if learning is to take place"*. Lewis and Greene (1982) add:

> *"That so many learn poorly when confronted by formal studying is not surprising, if you consider the haphazard manner in which the*

> *skills have been acquired. We are never taught in any systematic way to learn, but have to pick up the necessary techniques as a result of experience, from watching others performing certain tasks, by following rules for rote memorizing, and out of the mistakes we make. Such methods are not merely inefficient, they are frequently extremely damaging to performance. The child who, simply because learning skills have been poorly developed, consistently makes mistakes and receives reprimands is very likely to become anxious about all learning activities and develop negative attitudes to intellectual activities" (Lewis & Greene, 1982: 148-49).*

This is the case also with roadside apprenticeship, where skills are presented in a haphazard manner and the order of learning is informal, and content is unstructured and unorganized, and under an ill-equipped master-craftsman with no curriculum to guide what is to be learnt. The apprentice merely observes what the master does, and then imitates him.

In addition, the list indicates that evaluation of trained apprentices is dependent on two factors: (1) customers help to determine mastery of apprentices, through consistent approval of services rendered to customers, and (2) apprentices' consistency in diagnosis of faults and demonstration of skills shows mastery. The halo effect can hardly be ruled out as major flaw in this haphazard evaluation method adopted by the master-craftsmen. The respondents' agreement that there is no formal examination given to the apprentices at the end of their training to ascertain mastery leaves much room for manipulation. Examination forms an important tool for evaluating mastery. The procedure used by roadside apprenticeship for evaluating mastery falls below educational norms. It may turn out that these graduating apprentices do not posses the required skills to make their contributions to the national economy. To be able to provide useful contributions to the national economy, these apprentices require a strong updating in technology. It is only when this is done that meaningful contributions can be expected.

Conclusion and Recommendations

Although Nigerian indigenous roadside apprenticeship has contributed to the growth of the economy, the training provided falls below modern training procedures. Roadside apprenticeship is unstructured and unorganized. Towards solving the problems of roadside apprenticeship, the researcher recommends the following:

1. The technical skills of master-craftsmen and journeymen should be improved upon through short courses at part-time evening schools. Mobile workshops may also be considered for use.
2. For those who do not have formal education at all, adult evening schools should be organised.
3. The Industrial Training Fund (ITF)'s National Apprenticeship scheme should be made functional by establishing one model vocational training centre in each local government area.
4. Efforts should be directed towards evolving the new apprenticeship programme, which provides students with on-the-job training in the workplace while they are still in school, towards theoretical principles and laboratory exposure. Day release can be organised in such a way that students may spend three days in the school while they are released for the remaining days for the workplace. In this respect, the roadside small-scale enterprise can serve as an outlet for on-the-job training.

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Public health professionals in an evolving system and its environment are facing increasing challenges in their work to meet the needs of communities. This is especially true in Thailand because of the economic growth in recent decades and the priority given to health systems reform. In anticipation of response to the needs, especially to support the need for human resource development in rural Thailand, a part-time international Master of Public Health Program, the Learning @ the Workplace Program (the program) was developed in 1996 by the College of Public Health (the College), Chulalongkorn University in Thailand. This paper describes this step in the needs assessment in which professional perspectives were explored in terms of the program's target group among professionals, specific learning needs and programmatic requirements. The authors work at the College of Public Health, Chulalongkorn University, Thailand.

Montira Inkochasan/ Thitikorn Trayaporn/ Marc Van der Putten

Public Health Education in Rural Thailand: Professional Perspectives on the 'Learning @ the Workplace' Program

Introduction

The program aims to create a new type of public health professional who would be knowledgeable, with broad critical thinking skills and with sufficient discipline depth, to meet the new challenges in public health.[1]

The program can be described as a form of experiential education in which students engage in activities that address health systems and community needs. Moreover, its structured learning experiences are designed to promote group learning and development. Reflective approaches and mutual gains among key stakeholders, such as health authorities, the community and students, are key concepts of the program.

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[1] Sitthi-amorn, C. (1993) Proceedings of the international consultative workshop: attributes and threshold capacities of public health graduates: College of Public Health, Chulalongkorn University. Bangkok: CPH, Chulalongkorn University, ISBN 974-7571-33-1

The program finds legitimacy in Kolb's experiential learning model[2] because it assumes that significant and important learning takes place by an integrated combination of abstract conceptualization (learning) and concrete experience (the workplace) linked with reflection on the entire learning experience.

Because of the emphases within Thailand's 9th National Health Development Plan (2002-2006),[3] the College embarked on a review of the objectives of its program. The initial step of this review was based on a broad-based needs assessment to contribute to curriculum development for the postgraduate professional development program in public health.

Method

Six Focus Group Discussions were conducted; one group with Provincial Chief Medical Officers and five groups with past and present students from all implementation sites of the program. Each group consisted of 6 to 8 participants who were purposively selected.

A moderator and an observer, using a discussion protocol, conducted the focus group discussions, which lasted approximately two hours each and were audio-recorded.

Data analysis was facilitated by the use of a code-book, a logbook, transcripts, inter-analyst comparisons and Ethnograph software.[4]

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[2] Kolb, D. (1984) Experiential Learning. New Jersey: Prentice Hall Inc.

[3] Ministry of Public Health Thailand. (2001). Ministry of Public Health and the 9th National Health Development Plan in Thailand. Bangkok: MOPH Bureau of Health Policy & Planning.

[4] Seidel, J. (1998) Ethnograph V. 5.0: A User's Guide. London: Sage Publications Software, Inc.

Findings

I. Target Groups

The program is seen as a postgraduate program in public health that targets students in rural areas, from provincial health offices up to health centers at the sub-district level. Participants pointed out that the target groups have 3 foci: educational background, job responsibilities and functional levels within the provincial health system.

(a) Educational Background

Participants referred to two specific groups within the provincial health system, namely those with a medical or para-medical background and those with a non-medical background. Participants expressed the view that a postgraduate program in public health should not exclude applicants with a non-health related bachelor's degree.

In addition, participants pointed to the importance of clear criteria in selecting students in terms of target group characteristics and prerequisites including language skills and professional experience.

(b) Job Responsibilities

There were different opinions among participants on target groups in terms of job responsibilities. Several participants pointed out that staff members involved in instruction, training and education would be preferred target groups. However, an underlying assumption here is that the human resource pool as well as responsibility domains are occasionally shifted within the provincial health system. As a result, the staff members of all levels should be encouraged to further their studies.

In conclusion, there were two different viewpoints among participants: (1) a total human resource pool perspective across responsibilities within the provincial health system and (2) a more selective perspective focusing on instructors and educators within the province for direct benefit to the provincial health office. The discussion turned then to functional levels within the health system, which was helpful in developing further insights.

(c) Functional Levels

Within the context of the needs assessment, functional levels in the provincial health system in Thailand can be generally classified into provincial, district and sub-district levels. There was more agreement between participants on functional level perspectives. The majority of participants expressed the view that the program should be accessible for all levels within the provincial health system up to health centers at the sub-district level.

However, in identifying target groups, personal motivation, ability to manage time for study and capability seemed to be as important as educational background, professional responsibilities or functional levels.

II. Learning Needs

Learning needs may vary from group to group based on present or future responsibilities and functional levels. Also provincial goals are important factors that affect learning needs, and these development goals may vary among provinces.

The Provincial Chief Medical Officers raised the following learning needs as important for the targeted provincial human resource pool: situation analysis, development of interventions, monitoring and evaluation skills and developing a lifelong learning attitude.

For student participants, continuous learning as well as applying knowledge to professional settings were seen as important. Most of the participants expressed learning needs related to themselves such as qualitative and quantitative research methodology, program evaluation and strategic planning. Some students pointed out that they wanted to develop more management and applied research skills, while several were concerned with proposal and report writing skills.

Focus group discussing actvities Photo: Montira Inkochasan

A weakness among human resources in insight into social aspects and determinants of public health was recognized. Further there was the need to improve communication skills.

III. Programmatic Requirements

Participants' perspectives on programmatic aspects can be grouped into the following categories.

(a) Educational Approach

Participants placed value in problem-based, student-centered and health systems-oriented learning. The approach of utilizing the students' work situation and the community for learning, as well as the opportunity to study at their workplace, seemed to be important program aspects.

(b) Program Design

Most Provincial Chief Medical Officers identified that the main purpose for them to collaborate with the program was to link health systems reform with human resource development in their provinces.

All students considered the specific design 'study while working' to be the program's strongest characteristic. The fact that they do not have to take leave for study was important to them. However, at the

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same time, concerns were expressed about collaboration and approval of local employers and provincial health authorities.

(c) Student Selection

The program, which uses English as the medium in rural Thailand, excludes several candidate applicants and, therefore, gives advantages to those having English proficiency. In addition, the language problem is considered to hinder learning. As a result, students called for clear and consistent selection criteria and standards.

(d) Academic Level

The discussions on eventual multiple options in academic levels lead to the conclusion that certificate courses in public health are less attractive. A postgraduate diploma could address certain needs, but with the condition that credits should be transferable if students decide to continue to take up a Master's degree. Therefore, a Master's degree in public health is considered to yield the highest motivation among professionals. An important point made by students was that the College should consider its potential, readiness and performance before extending options.

(e) Implementation Site

The majority of Provincial Chief Medical Officers preferred implementation of the program at the provincial level because integration of learning and work would be more feasible and more beneficial for group learning.

Students seemed to prefer implementation at the regional level because exchange of experience among students was seen as positive. On the other hand, from the managerial point of view, regional program implementation was seen as a disadvantage, especially in terms of coordination, distance and travel time for students.

Discussion and Conclusions

The authors acknowledge that the interaction of participants with one another and with the moderator might have undesirable effects. However, the moderator was professionally not involved in the program and she was sufficiently experienced to deal with group dynamics.

Based on the purposive sample strategy and the nature of this study, results represent perceptions of the participants only and cannot be generalized to a larger group of public health professionals.

Findings support the conclusion that target-groups for the program should be local public health professionals with medical or paramedical and non-medical backgrounds in education, mainly responsible for instruction, training and education, and may work at any level within the provincial health system.

Perceived learning needs concentrate on strategic and operational management skills including monitoring and evaluation, applied qualitative and quantitative research and the development of a lifelong learning attitude.

The participants believe that the application of core skills in public health, through a problem-based approach in teaching and learning, can address local issues and priorities.

Regarding programmatic requirements, the participants preferred the current educational approach, program design and academic level provided, but they proposed that the College consider student selection and program implementation site.

The outcomes of these focus groups provide more in-depth understanding of professional perspectives and will complement other methods used in the needs assessment to support curriculum development efforts for the program.

Rain festival among the Nahuta in Guerrero State, Mexico

Photos: Ursula Klesing-Rempel

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CULTURAL DIALOGUE AND ADULT EDUCATION

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yo pienso

Como mujer Indígena quiero
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que conozcan nuestros derechos
y se sientan orgullosos de ser
Indígenas.
Seguir luchando para que ayu-
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Seminar: Indian young people in the age of globalization
Photo: Ursula Klesing-Rempel

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The terrible events of 11 September emphasised the need to expand intercultural dialogue. The Education and Culture Directorate-General of the European Commission, and more specifically the Jean Monnet Project, held a conference on intercultural dialogue in Brussels from 20 to 21 March 2002. This was attended by high-ranking politicians, academics and religious leaders, including the Chief Rabbi of Brussels. Representatives of Judaism, Islam and Christianity took part in the discussion, and welcomed the fact that recent years had seen a considerable increase in readiness for dialogue between religions. We reprint below the opening address, "Why Dialogue is Important", by Romano Prodi, President of the European Commission. He emphasises, with great commitment, that the European Union must make every effort to expand dialogue with its neighbouring countries, especially in the Mediterranean area, which is where the three great religions originated. Copyright: European Commission 2002

Romano Prodi

Why Dialogue is Important

We have invited you here today to continue the dialogue between the representatives of civil society from around the Mediterranean.

The topic before us – dialogue between cultures and peoples – is an idea I am very keen on and is especially relevant in the context of Euro-Mediterranean relations. But it is not simply an idea. It gives us an agenda for action too. The peoples on the shores of the Mediterranean share a long history. Now they have an opportunity to develop harmonious relations as neighbours, based on tolerance, mutual respect and fairness.

We must work at this together, without let-up, on a daily basis. And our efforts must not just focus on economic and political issues, they must extend to the whole scope of our relations.

What does ‘working together’ imply? Henri Teissier, the archbishop of Algiers, when referring to the work of Vatican Council II on the position of other religions, Islam in particular, said that, *however significant such studies were, they could not bear fruit without a joint undertaking by Christians and Muslims to work towards truth, justice and peace.*

I fully endorse these views. They imply an original approach to dialogue and culture. Many scholars have worked to define culture. But since we ourselves are totally immersed in it, culture is not easy to pin down: it dictates the very way we think and speak. The words of Archbishop Teissier help us understand that culture is a collective effort to establish shared knowledge and values.

I am convinced that this meeting will contribute to this collective effort. With an eye to the meeting of ministers in Valencia in April and the meeting on culture in Beirut in September, I hope that your conclusions will give impetus to the measures we need to take. They must be seen as credible and realistic by policy-makers throughout the Mediterranean.

***

The European Union – and especially the Commission – recognised the importance of intercultural dialogue well before the 11th of September. Constant responsiveness to the cultural dimension of Euro-Mediterranean relations has always been an integral part of the partnership launched in Barcelona in 1995. We are all aware of that project’s weaknesses and shortcomings. That is why, at a time when the Union is preparing for enlargement, our objective is to develop a special relationship between Europe and the Mediterranean, as part of our policy towards neighbouring countries, using all the instruments available.

We have devised various programmes with civil society in mind – promoting the education of young people and knowledge of our different traditions. Let me quote some examples:

1. We launched the Euromed Youth programme to promote the integration of young people in the 27 Euromed partners. We have already extended the Tempus programme of university exchanges and we will look into the possibility of doing the same with the programmes for continuing and vocational training.
2. Next year we shall be able to extend the Netdays (Netd@ys) network for schools to the Mediterranean region. We are also looking into the possibility of setting up a Euromed programme on the lines of the Fullbright programme of study grants. It would be part of a comprehensive new programme of cooperation in higher education with countries outside the EU.
3. Other Euro-Mediterranean programmes cover audio-visual communication and the historical heritage. They seek to help foster a spirit of mutual tolerance through better knowledge of the region's priceless heritage.

Further action is now needed. The point we have reached is not the end of the road. We must create more opportunities for civil society to develop interchange. Dialogue between us must be more visible and accessible. Various projects are under way. For instance, our proposal to set up a Euro-Mediterranean Foundation for dialogue between cultures. It will collaborate with like-minded public and private bodies. This will provide more continuity and step up the impact of events such as today's.

I am also considering the possibility of setting up a group of "wise men" – and of course women – in the framework of the Jean Monnet network to continue studying the issues we are dealing with today and tomorrow. The Barcelona European Council has approved the setting-up of a fund for boosting Europe's private and public investments in the southern Mediterranean countries. The Commission and the Spanish Presidency had a more ambitious project in mind. This has not been possible at present but it is still on our agenda. Other actions will follow.

Dialogue is not something that takes place only elsewhere, beyond our borders; it has to start here, in Europe itself, in our inner cities, which are all too often the seedbeds of intolerance and prejudice. We must rediscover and draw on our shared cultural heritage with an eye to mutual respect and understanding.

•••

These actions will only succeed if we are clear about the foundations of our cultures and civilisations.

The Mediterranean region gave birth to the three great monotheistic religions that have shaped our thinking and forged our view of the world and of the human race.

I have made this point on several occasions. Throughout history, religions have often been the cause of conflicts, even of major wars. But they have always been a source of hope too, and of creativity and wisdom. Religions can – and must – make an essential contribution to goals we all share:

- a future free of fear
- peaceful progress for the good of all
- defence of human values against violence, hatred and discrimination

Religions must work to bring all Mediterranean peoples closer together. They must induce them to work together more closely in combating poverty and injustice.

Let's not forget that charity – in other words love for one's fellow human beings and the precepts that flow from it – forms the common basis of these three religions. And of others too.

Our present-day societies have drawn on these shared precepts in their search for principles of organised collective solidarity.

This solidarity at the heart of our societies can hold together only if it is underpinned by a wider solidarity. This was the point that Chief

Rabbi Sirat was making last January when he called on "*the leaders of nations to make every effort to create and consolidate, on the national and international levels, a world of solidarity and peace based on justice*".

Solidarity is thus grounded in justice. Speaking in Assisi, the Iranian religious leader Ghomi urged us to heed "*the cry of those who refuse to bow down to violence and evil*" and to "*make every effort possible to offer the men and women of our time real hope for justice and peace*".

And, on the subject of peace, the Pope reminded us in the aftermath of the 11th of September that: "*there is no peace without justice, no justice without forgiveness*".

In 1999, the United Nations decided to make 2001 the "Year for Dialogue among Civilisations".

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But the features of any civilisation and the relations between civilisations cannot be explained exclusively in terms of religion.

The fault lines are also produced by political injustice, economic disparities, grinding poverty, a lack of future prospects – the consequences of uncontrolled globalisation that are perceived as cultural and political oppression.

Observers of events in the Middle East can testify that the fundamentalist movements on both sides, Israel and Palestine, have turned to extremism with the failure of the peace process and the ever-greater destitution of the Palestinian people.

In this and other situations of conflict, Europe must use all the political and economic resources it has, and all its imagination, to create a prospect for dialogue.

It is not just a matter of brokering a cease-fire and delivering humanitarian aid. What we really need to do is to come forward as proactive mediators who can make the opposing parties look at the issues that divide them in a new light.

***

Why is the European Union so attached to the principle of dialogue, preferably a multilateral dialogue? And why do we set so much store by dialogue between cultures? The answers lie in the very nature of Europe's process of integration.

After World War II, Europeans found reconciliation through dialogue. It restored the people's confidence at a time when, bound up in their national cultures, they still lived in fear of war.

Later, dialogue meant reconciling an effective joint capacity to act with respect for each Member State's national identity and the citizens' need for democracy.

The effort that all Member States have made to understand the others has played a decisive role in the progress we have made together. No Member State has ever acted unilaterally. Today and in the future, the Euro-Mediterranean dialogue must be based on this approach and on the method followed for European integration.

In the dialogue between peoples, the European Union holds that in principle cultures are all equal and each has a right to full respect for its special features.

But respect for others does not imply automatically accepting any cultural practice, especially if they become divorced from the context that brought them into being.

There is no sense in the claim that cultures are equal unless it also asserts the right of every individual to physical integrity, to respect for their fundamental rights and freedom of conscience. These are not things that make us happier human beings, they are things that make us human beings.

Intercultural dialogue is meaningless unless the recognition of equality between cultures is matched by the recognition that every individual must be given equal access to fundamental rights.

You cannot demand that every culture be given equal respect unless every person belonging to them has equal rights and obligations as laid down in the Universal Declaration of Human Rights. In other words, we respect cultures if cultures respect individuals.

***

What is intercultural dialogue useful for?

Intercultural dialogue does not mean that the whole world has to bow down to the Western way of life or commercial values. The European Union is proof that there is an alternative. Our process of integration is the only successful experiment in the democratic management of integration between different cultures.

The EU's integration process is proof that uncontrolled globalisation can be stemmed. That the values and will of some will not necessarily be imposed on all others. Culturally speaking, this implies listening to others, being open to dialogue and making an effort to understand others.

Like all higher values, being open-minded and treating others as equal partners is something we work towards every day but never really attain. But we must never give up. Striving to achieve an ideal – and never giving up – is what gives meaning to life.

Naturally, human societies cover the whole spectrum, with an infinite variety of original, special characteristics. The European Union sees civilisation as embracing many facets of life: cultural and scientific, philosophical, spiritual, economic, political, social, educational, environmental, and so on.

The EU is careful to ensure that this concept of civilisation – as a multiple yet universal phenomenon – informs all its thinking and actions.

Having said that, dialogue between civilisations is not, nor should be, an instrument of political dialogue in the narrow sense, just a struggle over short-term interests. Or something to take its place. That would be counterproductive for both types of dialogue. On the other hand, if a dialogue between cultures is really taken to heart by civil society, it can become the fertile soil in which an amicable political dialogue can grow and bear fruit.

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Nearly nine centuries ago, in 1138, Al-Idrisi, the Arab geographer and writer, arrived at the cosmopolitan court of the Norman King Roger the Second of Sicily in Palermo. Al-Idrisi studied in Cordoba, travelled through most of the known world and wrote for the Norman king the most comprehensive work on world geography of that time that became known as "The Book of Roger".

In this work Al-Idrisi brought together Greek wisdom, his own culture and his observations in the field. His life and work are a perfect illustration of the openness, generosity and intellectual curiosity that should shape our discussions today.

I invite you, during these two days of discussion, to rediscover the spirit of openness that characterised medieval Mediterranean culture. A time when Christian, Muslim and Jewish intellectuals collaborated on major works of research.

I hope that these discussions, thanks to your efforts, will map out areas of dialogue where we can sow the seeds of new ideas and reap a harvest in our future policies.

I invite you all, whether in Brussels, Valencia or Beirut, to become the Al-Idrisis of Euro-Mediterranean cultural dialogue and to begin redrawing the geography of the human race.

Adult education has been developing its own interest in the notion of internationalism since the 1920s. Can AE help to create a new cultural awareness that extends beyond national borders, and thereby contribute to peace? What part can international organizations play in this? What is the relationship between theory and practice? Using the examples of UNESCO and European Union institutions, the author describes general trends and actual contents of adult education programmes. Prof. Dr Joachim H. Knoll is Professor Emeritus of Adult Education and Out-of-School Youth Work at the Institute of Education, Ruhr University Bochum. His specialist fields are: International and comparative adult education research; Adult education organisation and institutions; Youth media and media protection for young people.

Joachim H. Knoll

Adult and Continuing Education in and through International and Supranational Organizations

1. Definition and Origins of Internationalism

The terms *"internationalism"* and *"international"* refer primarily to international legal relations between a number of States, institutions or associations for the purpose of agreements, mutual support and discussion in political, scientific and economic matters, without any transfer or dilution of sovereignty, such as occurs in the case of *supranationalism*. In the context of adult education, "internationalism" and "international" also suggest, in addition to contractual agreements, people living and belonging together in a mood of cultural awareness that crosses the borders of their own State and thus represents a means of fostering peace. And this last aspect, the fostering and securing of peace, provides a link to the time when adult education first discovered for itself the notion of internationalism.

If we look at the development of international awareness in the practice and study of adult education, we shall find confirmation of the thesis which I have put forward earlier, that during the period following the Second World War, as distinct from the "Weimar" period after the First War, adult education practice was more internationally minded than academic theory. This thesis becomes even firmer if we look at the special case of the extraordinary international work done by the DVV. The "Institute for International Cooperation" is an instrument of developmental education which lends support to the further thesis that German adult education practice has applied what it has learnt from its experience at home in playing a part in the creation and reconstruction of adult education systems in other countries and continents, and in providing educational support for development, an approach that has been approved and recognised in grants from the public purse.

In Germany, adult education first acquired an identifiable international orientation during the Weimar Republic, when it was associated with a belief in the League of Nations on the assumption that education could contribute to peaceful coexistence between peoples by fostering mutual respect and acknowledging differences. The first concrete steps towards encounters between the academic discipline of adult education in Germany and its counterparts in other countries, initially in Europe, were taken in 1925 with the establishment of the German committee of the World Association of Adult Education, first set up in the United Kingdom by A. Mansbridge.

We can thus maintain our thesis that the academic study of education was open to international influence in the 1920s, while practice remained largely unaffected.

2. The Contribution of International Organizations to Adult and Continuing Education

Information about international trends in teaching and learning can be gleaned both from publications issued by individuals and from agencies, which may have either a reform agenda or an interest in adult education that takes a synoptic view of existing provision. We are thinking here primarily of bodies that are part of or associated with international organizations concerned with

- adult education or other educational policy (legislation, funding, cooperation and coordination)
- individual topics in the practice of adult education (lifelong learning, vocational adult education, literacy, the environment, health) or
- programmatic designs for the future (the 1972 Faure Report, the 1996 Delors Report) to stimulate international discussion

Admittedly there is no hard and fast distinction between individual academic publications, such as university research papers on adult education, and those issued by the agencies of international organizations, since the people involved are often the same. This is evident from the fact that numerous professors of adult education are or have been working for international agencies (J. LOWE, G. WEDELL, A. TUIJNMAN, P.BELANGER, L. BOWN) or contribute academic expertise without having a permanent association with any particular agency (C. TITMUS, W. LEIRMAN, P. JARVIS, J. KNOLL). At the same time, there is no disputing that large-scale research, especially on an empirical basis, can no longer be handled by one individual. For example, funding has been provided for

- the compilation of statistics on literacy in industrialized countries by the OECD
- literacy as part of development policy by UNESCO
- investigation of the mentality and profiles of adult education and adult educators in European countries (DELPHI Project, W. LEIRMAN, Leuven) and for
- models of vocational education in a learning society by the EU

These organizations have also been involved in the implementation of such initiatives, or at least in the basic design.

It should be pointed out at this point that the way in which international agencies think and work is such that discussion of adult education phenomena and problems is invariably hedged about with a particular interpretation of the world and society, and this very quickly turns into a simplified form of short-hand. In the literature on adult and continuing education there is, for example, a consensus that adult education must surely be heading "towards the learning society". This establishes a view of the world, in accordance with which subsequent reforms should be introduced. There are also descriptive terms for society such as the **information society, the civil society, the knowledge society, or the courageous citizens' society.**

As a result, the programme presented at the G8 summit in Okinawa, the "Okinawa Charter on the Global Information Society", very soon became a formula: "... everyone, everywhere should be enabled to participate in and no one should be excluded from the benefits of the **global information society"** (my emphasis).

3. General Trends and Actual Content of the Adult Education programmes of International Organizations

First of all, all international organizations, including the NGOs (non-governmental organizations) and research establishments represented at CONFINTEA V (the Fifth UNESCO International Conference on Adult Education) in Hamburg, would probably agree with the general trend identified by Federico Mayor, the former Director-General of UNESCO and described as follows in reference to the Delors Report:

> *"The aim of lifelong learning is to enable active and creative participation of all members of the community. Adult learning occupies a place at the heart of society and responds to the concrete aspirations of individuals.*

> *Learning to be*
> *learning to do*
> *learning to live together are the core concerns – this includes learning to read, write and count, but what is most important is to ensure that all women and men are free and more responsible citizens."*

This description includes the notion of lifelong learning, as well as that of the four pillars on which learning rests in the learning society (Delors Report), and it enshrines the fundamental right to education in all countries and for all people.

There is also general agreement on lifelong learning, on the new character of the learning society, on the part to be played by adult education in the development of social institutions, on the right to education, and on the practical consequences to be drawn, right down to the way people are to plan and live their private lives in fields that are nothing to do with education and training.

The international organizations which most readily typify internationalist adult education, and whose activities also affect adult education in European countries, include **UNESCO, the OECD, the EC/EU and the Council of Europe,** together with the special institutes and centres for educational policy-making and research which draw up proposals for forward-looking education on behalf of these agencies.

Since we cannot describe them in detail, we shall make a selection according to their prominence and scale of operations. I shall therefore restrict myself initially to UNESCO and the EU.

4. The Example of UNESCO

The institutes belonging to UNESCO, and their range of responsibilities, clearly demonstrate UNESCO's profile in educational policy, practice and research. Part of their role is to make proposals and recommendations for adult and continuing education, or at least to make and influence projections in this field. They include:

1. the UNESCO Institute for Education in Hamburg, which has come to specialize in basic education, lifelong learning, adult literacy and adult non-formal education
2. the International Institute for Educational Planning (IIEP) in Paris, which carries out research into educational planning, including statistical methods, and provides relevant practical training for specialist educational planners
3. the UNESCO Institute for Information Technologies in Education (IITE), Moscow, which is still being established
4. the UNESCO Literacy Institute, formerly in Teheran, which has stopped functioning for political reasons. The International Literacy Institute, University of Pennsylvania, USA, which is affiliated to UNESCO, now fulfils a similar role

It is evident from the structure of UNESCO that specialized research has "migrated" from national universities to international organizations, and this is also true of comparable institutions in the other international organizations.

The Delors Report, which takes the general trends referred to above as given, sets out as it were to anticipate the world of tomorrow and therefore explores areas which are not part of the core of education but are said to have global implications. It should be asked at this point whether the power of adult education is not grossly overvalued when it dreams of utopian plans for the world and takes on a socially therapeutic role as a result. The Delors Commission was, for example, instructed by UNESCO to concern itself with the following areas:

1. cultural education
2. education and democracy
3. education and social processes
4. the world of work
5. education and development
6. education, research and science

– and it was naturally told to keep the principle of "thinking globally and acting locally" (globalization and decentralization) constantly in mind. Adult education was being asked to do something which it cannot, especially when it was also supposed to developed a consensus on values which would reconcile religion and culture and accommodate their particular spiritualities.

A list of what is assumed to be a matter of agreement would also include, besides general principles, the specific demands made of educational policy and adult education:

- basic education for all
- a balance between vocational and general adult education
- literacy, with emphasis on the links between literacy, numeracy and social skills
- closer ties between adult education and the mass media, including types of distance learning
- professionalization providing a bridge between practice and research, and
- legislation guaranteeing basic funding

5. The Example of the EU

During the early institutional history of the **EU**, the European Community (**EC**) regarded "vocational training" as a secondary measure supporting the process of economic regulation and unification, and in the mid-1970s terms such as "vocational adult education" and "migrant/youth education" are found in plans for harmonization; but today, "vocational and general education" stand side by side on an almost equal footing. The EC/EU did not fall in with the distinction made between the concepts of adult and continuing education, which began in the Federal Republic with the structural plan of the German Education Council (1970) and apparently became firmly established in the overall education plan of the Federal-Länder Commission for Educational Planning (1973).

The aims set out in Articles 126 and 127 of the Maastricht Agreement (the 7 February 1992 version of the treaty establishing the European Community), and in the identically worded Articles 149 and 150 of the Treaty of Amsterdam (the 2 October 1997 version of the treaty establishing the European Community) on "General and Vocational Education and Youth" mark a temporary end to developments. They are subordinate to the principle of subsidiarity set out in Article 3b (now Article 5) of the Treaty: *"In those fields which are not its exclusive responsibility, the Community shall, in accordance with the principle of subsidiarity, only act where and to the extent that the aims of the measures in question cannot be adequately achieved at the level of Member States and can therefore be better achieved at Community level."* The principle of subsidiarity requires restraint in such matters as amending constitutional guarantees of federal rights in the Federal Republic; in consequence, the Federal Government may initially only transfer sovereignty in respect of its responsibility for vocational training. Harmonization and subjection to the Community are rejected by nearly all Member States. An assessment of the current responsibilities and room for action of the EU produces varied results: on the one hand, almost unthinking hope is placed in further support and development for adult and continuing education, but on the other hand, it is remarked tentatively that the texts of the Agreements contain nothing new in addition to the support measures, and particularly the exchange programmes, which are already being provided without being enshrined in Community legislation.

Since the Maastricht Agreement (1992), the EU's overall education policy has been strengthened by the "European Year of Lifelong Learning" in 1996, for which the following were among the topics selected: the significance of general education, promotion of vocational and general continuing education, motivation for learning throughout life, cooperation between educational and commercial agencies, and encouragement of the European dimension.

The European Commission's White Paper on general and vocational education "Teaching and Learning – Towards the Learning Society"

(1995) argues for greater planning of vocational training and vocational continuing education with a threefold emphasis on the learning society, vocational education and the European dimension, and with a particular call for flexibility in national systems (schools and the world of work, on-the-job training, language learning, recognition of qualifications under the principle of equivalency, etc.).

The two documents “Memorandum on Lifelong Learning “ (2000) and “Making a European Area of Lifelong Learning a Reality” (2001) launched a consultation process among adult and continuing education establishments in the Member States of the EU. This is based on a concept of lifelong learning embracing all institutions of school and out-of-school education that is founded on continuity and no longer on closed and separate systems of education and training.

Adult education is offered support under **SOCRATES** through the **GRUNDTVIG** Programme, which is addressed to all adult education organizations, with the emphasis on “promoting the European dimension of lifelong learning through greater transnational cooperation”.

While the international and national dimensions of adult education still appeared to be quite distinct from each other in the 1980s, they now appear to be drawing closer in the discourse. On the one hand, there used to be the generally large-scale surveys providing international comparisons (lifelong learning, literacy, country reports), and on the other, there were descriptions of adult education which barely went beyond the German system. While practice certainly sought and found an international dimension to its work, research work on adult education still seems even today to be reluctant to open up internationally, although an international approach at certain universities gives some hopes of a general change of course. The new division of academic education into BA and MA courses may perhaps encourage such hopes, as may the financial stimulus of EU support programmes.

Essentially, however, the principle of subsidiarity still restricts the impact of international adult education on national education policy, ruling out for the time being any grand hopes of the harmonization of adult education systems in the countries of Europe, and thus of the notion of "European adult education".

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Participants in a language cours

Photo: Landesverband der Volkshochschulen Niedersachsens e.V.

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This paper points out that the need for dialogue between cultures and religions acquired a new dimension through the events of 11 September. What does this mean in practice for the work of the IIZ/DVV? The Institute is increasingly active in crisis regions in the fight against poverty and terrorism. Other relevant areas of work are, for example, projects on the theme of "intercultural dialogue" and the issue of EU eastward expansion. Prof.(H) Heribert Hinzen, Director of the IIZ/DVV, provides an overview. He has occupied various posts within the Institute since 1977 in Germany and abroad. He has taught and researched at universities in Germany, Sierra Leone and Hungary.

Heribert Hinzen

After 11th September ... Development-Oriented Adult Education as World Domestic Policy?

On 11th September 2001 I was sitting in an aeroplane on the way to Azerbaijan, one of the three countries in the Southern Caucasus, in order to conduct negotiations there on a new project office that we were opening. The combination of flying time and change of clock meant that I was late reaching the hotel. Whenever I unpack, I usually welcome the chance to catch a glimpse of television news. This time I was greeted by an Azeri station with what I took to be a science fiction thriller in which aircraft were crashing into skyscrapers. But I was looking for news, and so I clicked on to another channel, a Turkish station which was showing the same, barely recognisable footage. It must have been a good film if it was on in several languages at once! I still did not grasp what was going on as I clicked on the next channel, a Russian one, in the background of which the same film was showing, while President Putin was giving an interview in the foreground. Since the same film sequence was inserted several times while he was speaking, it gradually dawned on me that something quite awful must have happened. Unfortunately I could not find any of the usual global (?) channels such as CNN, the BBC or Deutsche Welle. I had therefore to wait until next morning. I then discovered what had happened from the Embassy. I still could not imagine it. I learnt from telephone calls to head office and the Ministry about the regulatory response: aircraft grounded and security controls. A few days later I took a 24-hour train journey from Baku to Tbilisi, the capital of Georgia, where the northern mountain valleys join those of Chechnya, providing a through route to its capital, Grozny.

About four weeks later I was talking to a German representative at the World Bank in Washington, for which we were conducting the study "Literacy and Livelihoods".[1] Naturally the conversation got around to 11th September, and the salvage and clearing-up operation in New York. It was the time when diplomatic moves were being made to put together as wide an anti-terrorist coalition as possible. We spoke of what had struck us on the day itself. I told him of my impressions of the journey to the Caucasus, of our plans there, and of our discussions with the local World Bank offices. He then said that he had been flying from Frankfurt to Washington on 11th, and that they had been informed half way there that the airspace over the United States was closed, so that the plane had to return immediately to Germany. No one mentioned the unthinkable.

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[1] See John Oxenham et al.: Skills and Literacy Training for Better Livelihoods. A Review of Approaches and Experiences. Africa Region Human Development Working Paper Series. Washington. The World Bank 2002

In the many conversations that I have had since, especially in connection with the allocation by the German federal parliament, the Bundestag, of special funds to combat terrorism, and with the Action Programme 2015 (more about this later), I found the observation of one colleague particularly unnerving: we are so bemused by that brutal terrorist attack that we overlook the depressing fact that people were also dying of poverty throughout the world on 11th September 2001, and on 10th and 12th, as on every other day of the year – so are these millions of deaths to be accepted as normal? UNICEF alone speaks of 40,000 children a day dying of illnesses born of poverty. Where is the alliance fighting with the same determination in this case? Of course, one cannot set off the one against the other. But it is important to look further, as does Prof. Czempiel of the Hessian Foundation for Peace and Conflict Resolution, when he remarks that although poverty cannot be seen as the only cause, it must be regarded as a "breeding ground for terrorism". We still have to face up to the question: has education any relevance to this, and can it do something to improve the situation today, or failing that, tomorrow?

On the very day when I started responding to the Editor's invitation to write about "Globalization and Regionalization from the Standpoint of your Institute", I came across two interesting publications dealing with the notion of world domestic policy. In its latest edition, das forum, the journal of the Bavarian Volkshochschulen, focuses on this question, discussing future economic and globalization issues associated with the local Agenda 21, and dialogue between Jews, Christians and Muslims. It concludes with the message "Many cultures – one Volkshochschule". The Foundation for Development and Peace has also just brought out its latest Policy Paper on "World Policy at the Crossroads", in which it argues: "In response to 11th September, world policy needs to aim at cooperative world domestic policy. Europe must be willing and able to give a lead in this change of direction. And other world regions must play a greater part in shaping the world economy and world policy." The term "development-oriented adult education" in my title may now make more sense.

If interested readers do not know as much about the work of this Institute as they would like, they can find out more from www.iiz-dvv.de, from our annual reports or from a publication that appeared in 1994 looking back on the last 25 years.[2]

I. What Particularly Concerned the IIZ/DVV and its Partners in 2001

Education for All – Lifelong and Crucial for Living

Regardless of all the discussion about the relationship between education and development – whether the one comes before or after the other – it is clear that education is a "must", a prerequisite, a key or a catalyst. The figures put forward at the World Education Forum in Dakar in April 2000 were less surprising than shocking: nearly 900 million young people and adults cannot read and write, while over 100 million children of school age are deprived of their right to education. The year 2015 was declared to be the date by which decisive advances were to be made (a halving of the illiteracy rate, schooling for all children, equality of opportunities for girls and women).

More than eighteen months have elapsed. The coordinating committee specially set up by UNESCO, Unicef and the World Bank met in Paris in October and found that little had improved and much had grown worse. The press release of 29th October from the German UNESCO Commission was therefore right in choosing as its title "Education falling behind": for further information, it refers readers to www.unesco.org/education So far it is still far from clear where the additional 15 billion euros that are needed are to come from. Demographic growth means that another 150 million school places have to be found every year for Africa, the Arab States and South Asia alone; at the same time, around 90 million adults need to become literate each year. Although the main burden is to be borne by the countries themselves, it is obvious that they cannot succeed without support and funding from the donor community. Surely no one can doubt that this would be a wise investment. No one dares to ask, for example, what the Israel-Palestine conflict, which has currently flared up again into open warfare, is costing in lives and material resources.

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[2] Cf. for example the Institute's recent annual reports and volumes 12 (Adult Education and Development: 25 Years of IIZ/DVV) and 28 (Partnership and Solidarity in Action. International Cooperation Activities of IIZ/DVV) in the series: International Perspectives in Adult Education. Bonn: IIZ/DVV 1994 and 2001

Education in Development Cooperation

It might be assumed that anyone who cares about a fairer world and the development policy that may achieve this would give generous support to education – in its own right and as part of other programmes. Unfortunately there has recently been an opposite trend, to which the IIZ/DVV Advisory Board and the DVV Board of Management called attention in clearly worded statements at its June meetings (which are worth reading at www.iiz-dvv.de): education is currently receiving less funding via development cooperation than in the previous decade. And this applies particularly to school and out-of-school basic education and to higher education; vocational training is an exception for the time being, having been maintained as an element of economic support.

One thing should be understood. This trend does not imply a policy decision to give less support to education. The Federal Government's Action Programme 2015 on combating poverty, which was adopted at Cabinet level and is thus part of an attempt to coordinate all areas of policy, contains in several places an explicit call for more and better education, especially when linked with AIDS education, environmental education and gender equality. What has happened, however, is an indirect, gradual shift of emphasis in bilateral negotiations between governments, as a result of which education is mentioned increasingly rarely as a separate project area: last year, education was mentioned explicitly in only four agreements with recipient countries, far less often than fields such as economic reform, water management, health and democratization. They are all important – but will they work without education?

Fortunately, increasing recognition is being given to this worrying trend: together with the German Association for Technical Cooperation (GTZ), the IIZ/DVV called for the establishment of a committee to pool efforts to reverse the trend. This has now been set up with additional partners such as the Federal Ministry of Economic Cooperation and Development (BMZ), the German UNESCO Commission (DUK) and members of the NGO Association for Development Policy (VENRO).

Adult Education Conference: Learning through International Cooperation

At the December meeting of the DVV Board of Management it was observed that international involvement and events concerned with European and global issues had been high on the agenda of the 11th German Adult Education Conference, held under the slogan "The Future needs Learning needs a Future". The IIZ/DVV can be proud of having been responsible for this element. In the fifty-year history of these meetings there had in fact never been so many participants from literally all European countries, as well as from the Caucasus, Southeast Asia and the United States, among the thousand or so colleagues discussing their achievements and prospects, not to mention a total of over 150 representatives from UNESCO, the EU and the World Bank. Those who are interested are referred to the latest issue of our journal "Adult Education and Development", which contains some of the contributions – including those of Federal President Rau, EU Commissioner for Education Reding and Prof. Nuscheler – in English, French and Spanish.[3]

Nearly 25 sessions provided information and opportunities for discussion. The variety of topics, only some of which can be mentioned here, speaks for itself:

- Agenda 21 – Eight steps towards Local Government of the Future
- Stability through Adult Education? Projects and Partners in South East Europe

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[3] See Adult Education and Development, 58/2002, pp. 93-149

- Learning: Lifelong and Globally?
- Adult Education and EU Enlargement in Central and Eastern Europe
- Globalization: Is the South Losing Touch?
- International Cooperation and New Partnerships
- European Voices on the EU Memorandum on Lifelong Learning
- Adult Education Centres in the Context of Globalization
- Education for All and Lifelong Learning

A fuller report would include the many workshops on intercultural and cross-border adult education, and language learning and certification in the European Year of Languages, in the context of course of the consequences of improved policy on integration and changes in citizenship. This Adult Education Conference may indeed have ushered in a greater internationalization of adult education, to which we need to react positively.

Dialogue between Cultures

In 1998, the General Conference of UNESCO declared that 2001 would be the "International Year of Dialogue between Cultures". It was stressed "how important tolerance is in international relations and what a significant role dialogue plays as a means of achieving understanding, overcoming threats to peace and strengthening interaction and exchange between cultures...". Every Member State was asked especially during this year "to plan and implement appropriate cultural, educational and social programmes" which would help to attain this great goal. Examples of best practice were to be documented as a form of recognition and to encourage their dissemination.

This special publication presents almost 75 such projects from the fields of visual art, literature, music, drama, festivals, the media, science, human rights – and education. This last heading includes references to the German Foundation for International Development (DSE) for activities in Chile (conflict management in schools), Indonesia (vocational colleges) and Ethiopia (school supervision), and to the work of the Georg Eckert Institute for International Schoolbook Research on foreign cultures in geography teaching. The IIZ/DVV is singled out in the section on Democracy and Human Rights for the project on Adult Education in South East Europe with its effective involvement of the Volkshochschulen.

II. What the IIZ/DVV and its Partners Can Expect in 2002

The need for dialogue between both cultures and religions has acquired new meaning with the appalling events of 11th September, as its consequences make plain, and the Gesellschaft für Deutsche Sprache (German Language Society) has declared it to be the Word of the Year 2001. Politicians worldwide reacted very swiftly with more than military action. And no one could have missed the view expressed that more attention needs to be paid to analysis and future strategic planning in order to deal with the growing gulf between rich and poor due to globalization, the social impact of which has not yet softened to an acceptable degree. As Kofi Annan's initiative entitled "Bridges to the Future. A Manifesto for Dialogue between Cultures" says, "Can there be peace without justice?" And, "How can we appeal to people's consciences throughout the world so that they recognise that poverty is an issue wherever it appears? Questions of this nature must be addressed at local, national, regional and global level." The document is dedicated **"to the innocent who died because their only guilt was that they were different from their murderers."**

Hence it is not only projects aimed at crisis and conflict prevention that must be given greater prominence in development work and in foreign policy on culture and education, but also those dealing with poverty, because of the close connections between the two.

Steps Taken under the Action Programme 2015: Combating Poverty

Development policy must be part of overall structural policy. It has to be measured by its contribution to the reduction of world poverty. The Action Programme 2015 was not only adopted by Cabinet; it also reflects the aims of international development. In other words, there is a remarkable echo effect at work, which was discernible at the international conference just concluded in Mexico on development funding.

Firstly, the federal budget presented in November 2001 contained a separate heading for measures to combat poverty. This was to provide back-up funds to reduce extreme poverty. Some of these special funds are to be made available for use in existing projects by the IIZ/DVV and other bodies working to strengthen social institutions (Arbeiterwohlfahrt [Workers' Welfare Organization], Caritas, the Education Service of the Federation of German Trade Unions, the Adolf Kolping Society, and the Raiffeisen and Giro Association). There was lively discussion in the Institute and with our project teams and partners abroad on how to improve the profiles of our projects in Africa, Asia and Latin America, which are in fact already working to reduce poverty. Proposals were put forward, activities suggested, and calculations made. Finally, a variety of applications were submitted to the Ministry:

- Ethiopia: Support for non-formal basic education and income-oriented training in regions affected by poverty
- South Africa: Information and education about HIV/AIDS – Initial and inservice training for community workers
- Caucasus: Income-oriented craft training in selected urban and rural areas
- India: Improving living standards of disadvantaged women through support for their self-help organizations
- Asia Region: Inservice training for multipliers to promote equal rights and representation for women
- Central America: Intercultural education in village communities with largely indigenous populations

We shall need to focus on effects in our implementation and reporting as both we and the BMZ are under pressure to demonstrate success. The programme will continue next year, subject to agreement by the Bundestag, which may approve additional funding. We therefore

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propose to make one person at the Institute responsible for monitoring these special activities (and their successors).

Measures to Combat Terrorism (Anti-Terrorism Package)

For the first time, the Federal Minister of Finance adopted a less rigid approach to budget consolidation in the Bundestag debate following 11th September. An Anti-Terrorism Package (ATP) was proposed as a response to national and international requirements. The largest part was to be played by the Ministry of Defence, but the BMZ and the Foreign Office were also given special funding. Once again, the IIZ/DVV was drawn into the discussions as a potential user, particularly as we are working in many of the crisis regions in the world. It gave me plenty to think about when I read in the remarkable publication “The Fragile Peace. Failed States, Violence and Development in Crisis Regions” that three sample regions were to be investigated – the Southern Caucasus, Central America, and Ethiopia plus the Horn of Africa, where we have been working with partners for years.

There was intense discussion in the Institute about how to use these funds too. If the nexus of “poverty, exploitation, deprivation of rights, oppression and powerlessness” was in fact the breeding ground for terrorist acts, then specific steps to strengthen projects should be taken in selected countries, together with our partners, aimed at development-oriented adult education that would improve people’s general conditions and particular circumstances. This discussion resulted in a list of suggestions to the BMZ as to how expand such activities:

- Sierra Leone: Education for peace and democracy, reintegration of refugees and ex-combatants
- Central Asia: Institutional support for sponsoring bodies, model income-generating vocational training projects
- India: Educational events providing intercultural and inter-religious dialogue between leading public figures
- Asia Region: Education for democracy and peace in regions of religious (Indonesia) and ethnic disturbances (Solomon Islands)

- Colombia: Education and strengthening of citizens' groups and civil society initiatives
- Latin America Region: Terrorism as a threat to democracy – Education for peace and human rights

The Culture and Education Department of the Foreign Office, whose main beneficiary is the Goethe Institute Inter Nationes, was also given funds. The following project proposals were discussed with the IIZ/DVV:

- German-Afghan cooperation on adult education, currently undecided whether in Afghanistan or for Afghans in Germany
- European-Islamic cultural dialogue focusing on German-Turkish cooperation in adult education

Formal applications are being drafted.

Applications for EU Support and the Conference on Intercultural Dialogue

The conference on "Intercultural Dialogue", which attracted high-level participants, was also devoted to the political and cultural issues needing more urgent attention than ever after 11th September, from the EU as well as others. The focus was on the Mediterranean region. Topics ranged from economic and other forms of globalization, and the image of Europe in the world, to dialogue between religions. In his opening address, President Prodi said: *"The fault lines are also produced by political injustice, economic disparities, grinding poverty, a lack of future prospects – the consequences of uncontrolled globalization that are perceived as cultural and political oppression … Dialogue is not something that takes place only elsewhere, beyond our borders; it has to start here, in Europe itself, in our inner cities, which are all too often the seedbeeds of intolerance and prejudice."*[4] This dialogue will unquestionably need also to address cultural globalization, the detrimental aspects of which have been pointed out by Prof. Senghaas:

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[4] Romano Prodi: Why dialogue is important. Brussels: Conference on Intercultural Dialogue, 20/21 March 2002, p. 5; www.europa.eu.int/comm/index_en.htm
see also page 183 ff. of this issue

"Anyone trying to arrange intercultural dialogue today should take the cultural world that really exists as the starting point rather than the fiction of homogeneous cultures.... If it took that form, intercultural dialogue would make an important contribution to the gradual development of a cultural globality that will be marked by numerous criss-crossed links."

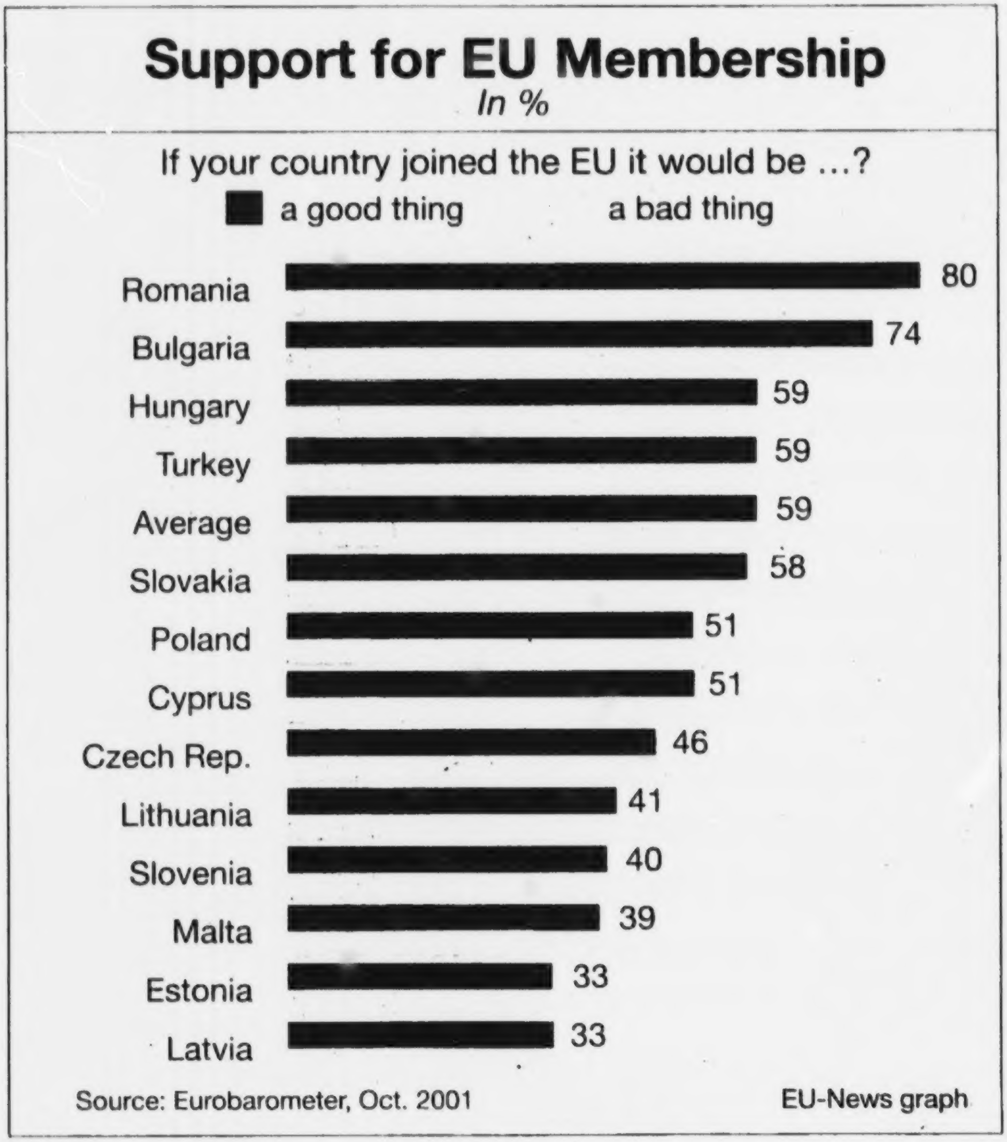
Back to the harsh reality of applying for project funds: the IIZ/DVV submitted two pre-proposals last year to the EU Grundtvig Programme, which is concerned with adult education. The response to these was an invitation to draft full proposals. These are aimed at

- Intercultural Learning in Europe (a network of partners working in adult education in 15 countries, plus European specialist institutions; duration 3 years)
- Tolerance and Understanding – our Muslim Neighbours in Europe (a project with 6 countries, plus specialist institutions; duration 2 years)

The IIZ/DVV is not breaking new ground for itself and its partners with these proposals. In the mid-1990s we were already involved in projects on "Youth and Adult Education for Ethnic Minorities in Europe". But if these new projects begin in the autumn, the VHS will also be drawn in in many ways. They could play a part in the field of "Global Learning", which is concerned with public information and development education, where intercultural issues are of great importance.

Adult Education in South East Europe – and EU Enlargement

These are not new but are very important project areas, with a wide variety of aspects and dimensions. From the point of view of timescale, it is evident from the figures in the federal budget and discussions with our funding bodies that support from BMZ funds for the countries in the first round of EU eastward enlargement – the Baltic States, Poland, Slovakia, the Czech Republic and Hungary – will run out very soon. In consequence, the relatively large-scale bilateral projects which have been managed by local IIZ/DVV project offices will come to an end. All the partners involved would have liked this to have been postponed somewhat, but there is no prospect of another donor of comparable size with long-term security for planning purposes. It would appear, therefore, that we must try to pool the content, organization and funding of various smaller projects and regional cooperation initiatives dealing with specific topics such as adult education policy and legislation, and cross-border procedures between



Support for EU Membership

In %

If your country joined the EU it would be ...?

Source: Eurobarometer, Oct. 2001

EU-News graph

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Poland and Germany, by involving the VHS Land Associations and their partnerships with Slovakia and Hungary.

The picture looks different in South East Europe. A second stage of the Stability Pact for the Balkans has just been agreed and approved in the federal budget. The funding will not be as generous as might be desirable or necessary, but at least it looks as though the EBiS project – see www.inebis.org – will continue to provide support for national (in Albania, Bosnia-Herzegovina, Bulgaria, Croatia, Macedonia, Romania, Serbia and Slovenia), regional, cross-border and inter-ethnic initiatives for a further period. The crucial concern is that the steering group set up with representatives from all the countries involved should be able to deal productively with differences by building on common ground. Two interesting points of convergence are the Adults Learners Weeks that have now become established in nearly all the countries, and the efforts to introduce political education in the Stability Pact region.

Lastly, one other project should be mentioned, which the IIZ/DVV is trying to launch together with the VHS Land Associations. This will provide the citizens of Europe with information and understanding about the future of Europe, and specifically the enlargement of the EU, particularly towards the east. One recent study states: "In the candidate countries, attitudes towards Europe are predominantly positive... A majority of 59 per cent of the population regard their country's joining the EU as a good thing. But a large proportion of people feel badly informed about the EU and the joining process." Further details are given in the figure. A similar survey in Germany showed 52% in favour in 2001, while a declining percentage, 42%, stated that they were against. The VHS can do much to provide good information and clarification. We are attempting to persuade the EU Delegation in Berlin and the press and information office of the Federal Government of this, and have submitted an application for co-funding.

Prospects: Local and national, regional and global

The future of Europe is at stake: internal integration and external expansion, not only eastwards, must succeed simultaneously. This is not just true when some crisis occurs and things do not go as anticipated in some country (we might recall our neighbour Austria). Mutual acceptance is called for, going well beyond mere economics. The EU is thus a project for the future in which education, communication and culture must be given high priority. Whether they receive this will depend in part on the educational institutions themselves. President Prodi points to what has been done, and warns of what remains to do: *"Intercultural dialogue does not mean that the whole world has to bow down to the Western way of life or commercial values … if a dialogue between cultures is really taken to heart by civil society, it can become the fertile soil in which an amicable political dialogue can grow and bear fruit."*[5]

Let us now turn from intercultural dialogue to the importance of education in development cooperation once more. The last report on the development policy of the Federal Government made it clear: *"Education is both a human right and a key to solving many problems of human development: education is an indispensable requirement for reducing poverty… education is indispensable if more people and regions are to be able to make use of the increasing opportunities of globalization being opened up in the world economy and through the worldwide use of new technologies, and if they are to acquire the skills needed to shape the future in the direction of sustainable development."*

Our everyday experience shows, whether we like it or not, that European, international and global considerations are becoming as important as local, regional and national concerns. The one dimension is not separate from the other, or some sort of afterthought, but the two are intimately intertwined. We often hear the call to "shape globalization". But what does this mean – not just for the poorest of the poor, but also for governments and civil society organizations?

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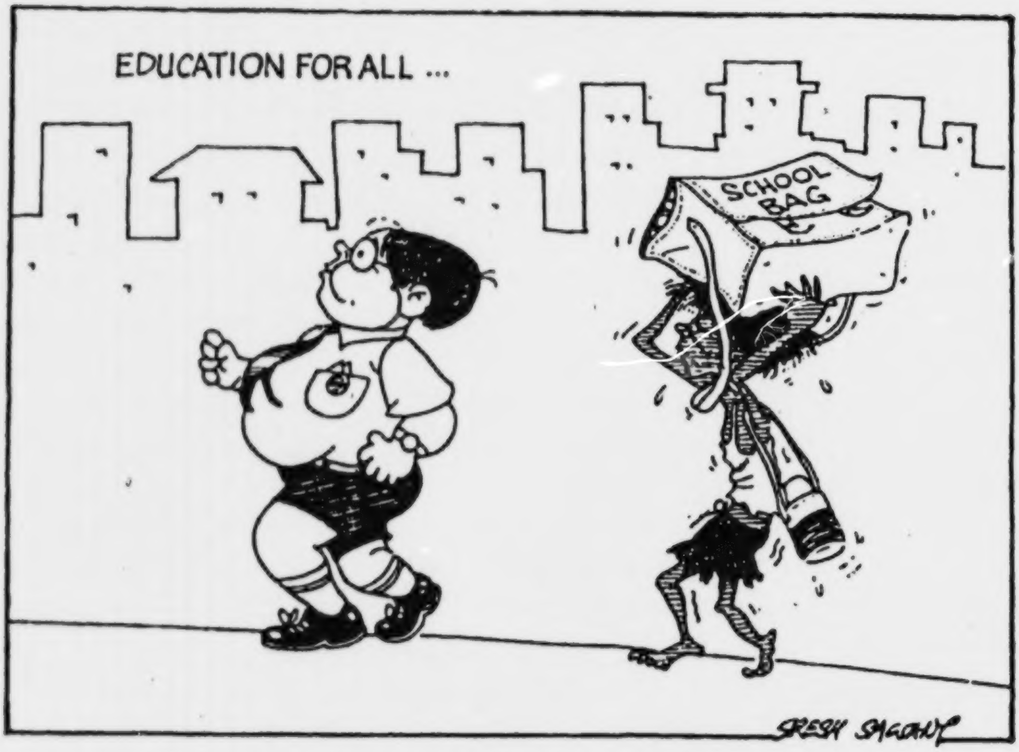
[5] Prodi, idem

The same might be said of adult education. It is becoming increasing important and complex, especially if it is to be seen – and provided – in terms of lifelong, global learning. Insular approaches – in Germany alone or through education alone – never sufficed in the past. In the future they will be even less valid. "Development-Oriented Adult Education as World Domestic Policy" is thus a call to take into account broader currents which we are already experiencing through social change, but to which we have not yet given adequate theoretical and practical attention.



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